

## Work package 3

Final report:

# Consumer research

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Report compiled by

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## 1. Introduction

### a) Aim

The aim of Work Package Three (WP3) was to conduct targeted and relevant research at the start of the SAINT project, to inform and influence the shape of the other work packages, especially WP4. As the overall project aims to develop greater market reach for SMEs operating in the slow adventure sector, it was vital that partners, and the SMEs in their region, were able to develop a deeper understanding of which consumers to target and how to market to them.

Using both primary and secondary research, the research was focussed on developing a better understanding of consumer trends, customer typologies and how to target consumers for example, as well as discovering the meanings and values that existing and potential consumers place on slow adventure experiences. In some respects, the work augmented research that had already been undertaken, more on the 'supply-side', in the SAENE preparatory project and *parallel* NORA-funded 'Nordic Slow Adventure' study.

### b) What is Slow Adventure?

Slow adventure is defined as a form of tourism which avoids the quick adrenalin-pumping hits of convenient adventure experiences, in favour of slow, immersive journeys, living in and travelling through wild places and natural spaces - experiencing nature in its timeframe, its seasons, its weathers and its variations. These journeys will typically include elements of the following:

- Wild food
- Wildlife
- Comfort in the outdoors
- Creating and enhancing people's understanding
- Human- or nature-powered travel
- An enhanced engagement with place

Slow adventure activities draw upon ideas framed around the partners' cultures and histories, such as hunting, fishing and wild foods, love of and respect for nature and wildlife, and the relationship between food and natural environments.

A more extensive, academic discussion of slow adventure is found in Appendix One.

### c) Criteria for SME Involvement in Slow Adventure

Slow adventure activities/experiences should incorporate all or some of the following elements:

- Learning and self-development
- Human/nature powered activity
- Activities that take place in settings that are natural, rural and wild
- Overnight activities *offered*, but not necessary
- Local food (or wild food)
- Wildlife watching/appreciation opportunities

- A slow pace, in tune with nature
- Activities that can be guided or self-guided

These experiences are *not* high adrenalin, motorised, or less than half a day in duration.

## 2. Methodology

In order to yield the required data and findings the work package was split into two discrete parts:

- Secondary, desktop research.
- Primary fieldwork.

### a) Secondary Research

The secondary research was undertaken utilising the following methodology, divided into work package leader and partner tasks:

*The Work Package Leader:*

- Defined and described slow adventure as an applied concept for businesses.
- Undertook a desktop analysis to determine and understand elements such as how and why people buy 'experiences': what are the ingredients and the contexts? Relevant websites, media articles, papers and reports were identified and analysed for findings and discussions.

*Project Partners:*

- Undertook regional and national desktop research to determine and understand elements such as:
  - What are the new trends?
  - Which consumers to target and why.
  - The development of customer typologies.
  - What new products and services in the slow adventure context should be marketed to these consumer groups.
  - How to target these consumers?
  - Possible ways to extend the tourist season through the promotion of slow adventure activities.
  - Market statistics and trends.

Again, relevant websites, media articles and reports were identified and analysed for findings and discussions.

### b) Primary Research

The intention of this phase was to conduct:

- Ethnographic research (participant observation) in each partner area

- Online or face-to-face interviews with ‘new’ or ‘potential’ consumers (WP Leader)
- Face-to-face or telephone interviews with SMEs, destination marketing organisations or projects/initiatives, for example (WP Leader)

Due to logistical issues, however, qualitative interviews was the predominant research method, employed in four partner areas, and supplemented in two cases by ethnographic research; in Scotland ‘standalone’ participant observation was employed as a separate exercise.

E-mail panels were organised, through a third party, by the WP Leader in four major consumer markets – these were utilised instead of interviews as a means of reaching potential customers. The rationale for their use was based upon the fact that, while surveying existing customers of SMEs is relatively straightforward, as many keep relevant databases, reaching potential consumers is much more difficult, for obvious reasons. As the project’s aim is to extend marketing reach to new consumer markets, e-mail panels therefore appeared to be a way of targeting these groups.

The WP Leader also drew upon its existing recent primary research for a slow adventure SME, and face-to-face discussions with three local destination marketing organisations (DMOS) to supplement the above desktop activity. The former two methods are described below in more detail.

### **Qualitative Interviews and Ethnographic Research**

The aim of the ethnographic research – participant observation – was for the researcher to capture the experiences of participants during their slow adventure activities, and how they interpret and understand those experiences, why people buy such experiences, and what the ingredients and the contexts are which they seek.

Where this was undertaken, it took the form of a discussion led by the researcher during his or her time with the group, based around a set of questions and prompts (see Appendix Two). Short ethnographic research exercises were undertaken in four of the seven partner countries, either by the partners or by external experts. In Northern Ireland and Ireland this was complemented by more extensive post-experience telephone interviews of the clients, using semi-structured, open-ended qualitative questions. Commensurate qualitative research was undertaken in Norway.

### **Email Panels**

This fairly recent means of contacting new customers involves emailing surveys to a database of people (who are paid to participate in these surveys) in chosen locations who fit criteria specified by the client. A company headquartered in Sweden was commissioned by the WP Leader to undertake this research for the project. The WP Leader devised a set of ten open-ended qualitative questions (see Appendix Three) and specified the following criteria for participants which it was felt would correlate with existing customer typologies and recognised intended slow adventure customers:

- Both male and female
- Aged 25 and over
- Salary over €30,000 per annum
- Educated to at least degree level

In order to reach the right markets that would both link to the project aim of extending the market reach of slow adventure SMEs and reach those appropriate typologies – essentially urban-dwellers in very large cities to whom slow adventure activities would be appealing ‘escapes’ – the following four geographic locations were chosen: New York, Sydney, Amsterdam and Berlin. Thirty respondents in each city was the target.

After the German and Dutch answers had been translated into English, the 1200 responses, in Excel spreadsheets, were thematically analysed, in order to pick out core themes, while the most meaningful participant quotes were identified to support and illustrate the ensuing discussion. The results are discussed in section four.

### 3. Secondary Research Findings

#### Setting the Context

Although its definition of adventure tourism is rather wider than that used for the purposes of this study, and includes cultural experiences for example, according to a 2013 Adventure Trade Travel Association (ATTA) study, the global adventure travel market rose in value by 195% from 2010 to 2013 to \$263 billion. This is a very significant increase in value in three years, particularly given some economies were still experiencing the effects of the global downturn. The very large rise in value has been attributed to increases in:

- Expenditure on vacation
- The percentage of people choosing an adventure travel holiday compared to other forms of holiday
- The number of people taking holidays
- Tourists from emerging markets

#### a) Trends in Nature-based Tourism

An analysis of trends in outdoor activities in Sweden suggests the following picture.

#### Shorter but Higher Quality Vacations

Starting from the 2000s it has been observed that Swedish participation in outdoor recreation activities have become more intense during a shorter length of time. Internationally it has also been noticed that there is an increase in demand of several short holiday breaks per year. A similar trend has been noticed in Norway, e.g. significant reduction of long overnight stays and a similar increase in one-day hikes in national parks. Possible explanations in the change of leisure habits include changes in employment patterns as well as growing diversification and competition within tourism supply, making it harder to commit to one specific activity for a relatively long period of time. It is expected that tourists will continue to have more time and money available for travelling in future, they will travel more frequently, to new destinations, and will take several shorter breaks.

Simultaneously, it has been observed that the visitors compensate for shorter stays by consuming higher quality services and experiences with higher levels of comfort. Additionally, tourists who stay for short periods tend to stick to 'the beaten track' and visit major tourist attraction, while longer-stay tourists visit a greater range of attractions and explore more peripheral regions.

#### Increasing Age of Participants

Researchers have found increasing age among the hikers in Swedish mountains in the last two decades. The aging of hikers also coincides with an increase in the importance of accommodation, services, marked hiking trails and accessibility: i.e. a higher level of comfort. Older tourists tend to opt for activities that are less adventurous, relaxing and more comfortable.

The increased demand for services is also similar to a general trend in tourism, with high demand for all-inclusive and luxurious short holidays mentioned above. Increased age among the visitors of national parks, for instance, has been also observed in Norway. On the other hand, the new generation of elderly, who are both healthier and wealthier, has also increased their participation in nature-based activities. There is a growth trend of middle-aged and older markets that are seeking to combine good standards with relaxation and natural settings, such as places that offer scenic beauty, privacy and high levels of service and comfort.

### **Higher Education and Income**

It is quite well known that participation in outdoor recreation is also linked to the socio-economic status of the participants. Hikers in the Swedish mountains, for example, are a rather homogeneous group. Surveys in Sweden have found a large proportion of well-educated individuals among the recreationists. This is neither new nor specific to Sweden. Research starting from the previous decades to the present suggests similar picture concerning engagement in outdoor recreation (specifically e.g. cross-country skiing, hiking), which attracts people from a higher socio-economic status, i.e. education and income.

### **Growing Segmentation and Specialization**

It has been observed that outdoor recreation and nature-based tourism in Sweden is becoming increasingly diversified and specialized. It is suggested that there are not only noticeable trends in Sweden in increasing demand for higher levels of comfort even in the 'wild' natural setting but also a growing interest towards 'niche' activities, requiring specific equipment. It has been noticed that there is an evident shift, characterized by increasing importance of experiences, achievement, adventure and activity rather than social interaction; male-orientedness, professionalization of leisure time and globalization in general.

Many studies of contemporary global leisure patterns indicate that the nature-based tourism sector is increasingly becoming specialized, diversified, motorized, 'sportified', 'adventurized' and even 'indoorized'. It is argued that the commercialization of outdoor recreation and increasing urbanization are the two major factors for economic growth in the nature-based tourism sector. A similar trend has been found in Norway, where recreation has become more diversified and specialized, where the newer forms of adventure activities are more sportified, and the activities themselves are more important to the experience than is the environment; in the USA, a growth in technology-driven and adventure activities has also been observed.

Researchers note at least two increasingly opposing (and potentially conflicting) segmentation trends in the outdoor recreation in the Swedish mountains. One segment supports high level of wilderness, i.e. absences of infrastructure development, wild landscapes, silence, solitude, absence of people in sight. The other segment, on the contrary, prefers high levels of comfort and infrastructure, social-oriented activities.

### **Nature Experiences**

Research shows that tourists are attracted to Swedish natural areas to experience landscape, beautiful scenery, wilderness, as well as remoteness, peacefulness, and solitude. However, there is also a general trend in tourism, as mentioned above, of an increasing demand for adventurous and motorized activities, and for shorter stays, services and all-inclusive vacation.

Looking at the supply of different outdoor activities among the nature-based tourism providers in Sweden (which focuses on commercial services), it has been found that water-based activities (i.e.

fishing, kayaking, canoeing and/or rafting, etc.) are the most important. Between 35-40 % of all companies ranked them as important. Other activities which more than 20 % of the companies ranked highly are picnicking, bird and wildlife watching and swimming in lake or sea. Various forms of hiking also receive rank 4 or 5 among more than 20 % of the companies. The same also applies to different forms of skiing. It is also a predominantly summer business – between 60-80 % of all respondents ranked the months June-September as the most important season.

## **b) What are the New Consumer Trends?**

The new wider consumer trends (ie. those not necessarily related to tourism) are in urban environments; in the UK, London in particular is the melting pot for new ideas, trends and tribes. Looking more widely at new and emerging consumer or 'lifestyle' trends, it is apparent that many of these recent, new or emergent urban ideologies will have implications for slow adventure. Recent 'movements' or innovations have included the following:

- 'Hipster' culture (see the extended discussion below).
- 'Pop-up' restaurants – temporary restaurants that 'pop up' from nowhere, often at an unusual venue, or perhaps in a private house, and which tend to make extensive use of social media for 'advertising'.
- Voluntary and community groups such as:
  - Upcyclers – people who take something old, or which someone has thrown away, and repair it or modify it for another use.
  - Freeganists – those who take food that others have thrown away. It is a combination of the word 'free' and 'vegan' as they only collect non-meat products – generally vegetables that shops are throwing away because they are the wrong shape, or do not look good.
- Retro movements in music, arts and crafts – for example the increasing popularity of LPs and the recycling, and rehashing, of the 'keep calm and carry on' wartime slogan.
- Food trends – such as an increase in the popularity of 'real ale' in the UK for example, or the increasing importance of provenance and food 'grown here not flown here'.
- A prevailing trend in Iceland is the sharing and informal networking creating disposable income for people, using either their fixed assets or time. What is being shared are homes, food, ideas and transport equipment and this is creating an ethos of a kind of 'back to our roots'.

### **Hipsters**

The Oxford English Dictionary defines a hipster as 'a person who follows the latest trends and fashions, especially those regarded as being outside the cultural mainstream'. The subculture has been described as a trans-Atlantic melting pot of styles and tastes, and broadly associated with indie and alternative music, progressive political views, organic and artisanal foods, and alternative lifestyles. In the UK at least they are associated with middle-class millennials who live in gentrifying urban areas.

While the stereotypical image of beards, plaids, tattoos may be rather derided by others in the mainstream, there has been a recognition that as they generally pursue greener and more ethical lifestyles - commuting by (fixed-wheel) bike, caring about the provenance of their food and buying



second-hand clothes for example – and are often highly skilled members of the workforce in economic powerhouses such as London, maybe ‘if more of us lived like them, the world would be greener, more left-wing and less preoccupied by greed’ (*Guardian*, 08.03.15).

## A travel manifesto for hipsters

### WHY WE TRAVEL

**We travel to see, to learn, to do and to think.**

We travel to experience new things, find familiarity abroad and connect all the strange dots that make this world so unique yet so familiar. We travel to push our boundaries so we can learn what we want out of life, where we want to be and what we want to do. We travel to learn.

### WHERE WE TRAVEL

**We travel both far and near.**

We travel to desolate islands and big cities, to far-flung places and to our grandparents’ houses. We travel to tourist hotspots and to undiscovered travel destinations. Home is where we make it.

### HOW WE TRAVEL

**We travel with an open-mind.**

We travel with enthusiasm and eagerness to discover the world we live in, this world of ours and of our neighbors. We travel with few preconceptions, with a desire to get lost and to maybe find ourselves during the process.

We travel to meet new people—other travelers and locals alike—those that can introduce us to new ideas, new things, new adventures. We travel with respect, compassion and

*An interesting parallel, at least in apparel and accoutrement, is that of the lumbersexual. According to the man who coined the term, American Tom Puzak, ‘the Lumbersexual is bringing the outdoor industry’s clothing and accessories into the mainstream’, a pseudo-outdoorsman who looks like he’s a ‘man-of-the-woods’ but who lives and works in the city and nurtures ‘a permanently unrealised dream of living in an isolated woodland shack’ (*Guardian*, 14.11.14).*

While little has been written about the travel preferences of hipsters, it is not hard to extrapolate their general attitudes, feelings and beliefs to the sphere of travel. One blogger generated his ‘travel manifesto for hipsters’ (see above); while much of this could apply to any more ethically-oriented traveller, it nonetheless provides an interesting window into their non-mainstream psyche.

### Trends that can be Turned into Business

### *Modern humanists*

They have already seen the world's metropolises. They appreciate quality of life, pure nature and responsibility. That is exactly what Finland offers, for example; the marketing activities of Visit Finland are targeted towards modern humanists. Characteristics:

- understanding foreign cultures
- new 'exotic' experiences
- 'pioneering'
- special destinations (away from mass destinations)
- life, lifestyle and culture of the 'natives'
- small but safe adventure, effortlessly
- tailor made, no packages
- possibility to change one's plans on the spot

### *Food*

There is a booming interest towards locally produced food and wild food. People want to know more and more where and how their food is produced. This opens new possibilities for wild food experiences: learn to collect/catch and learn how to prepare and finally enjoy.

### *Photography*

Photography, especially nature photography, is increasing amongst 'regular' travelers. Hand held devices and mobile phones have better photo-taking qualities; one does not need an expensive camera to get involved in nature photography

### *Wellbeing and Wellness*

Interest in wellbeing and wellness is growing. These themes can fill up part of a holiday or be even the sole reason for travel. Many studies show that as little as 15 minutes in a forest brings down one's stress levels. Many people are looking for an escape from hectic urban environments and some need a digital detox. The healing powers of nature are coming back and the knowledge our forefathers had is more and more appreciated.

### *Digital lifestyle of Younger Generations*

Big questions are how to get young people into the nature, and how to make it interesting for youngsters? Is it different mobile applications related to nature activities or perhaps geocaching, which combines both: the use of technology and the great outdoors? Geocaching is a hobby for five million people worldwide and the number is growing. Some people plan their holidays just to find caches in new countries.

### *Authenticity*

Authenticity is the key aspect of 2015 travel trends. The importance of meeting with locals in places that are truly representative of the indigenous culture is another massive trend that is developing. Travelers want to be able to truly experience the country that they are visiting, and come away with a true appreciation of the local experience. In short, the average tourist no longer wants to feel like a tourist.

### *Bleisure*

More and more young adults are willing to combine business & leisure trips, spending a few extra days in a destination after business is completed. Co-operation with event organizers, universities and corporations could help to attract people to have pre- and post-meeting experiences.

#### *Frontierism*

There is a group of people who are seeking destinations where they can get away from civilization. Areas of low population density and/or large forested areas are enough to create the wilderness effect, even though you might not actually be in true wilderness.

#### *Traditions*

There is an increasing interest in and revitalization of traditions, handicrafts, local food and culture, and local identities. Closeness and relationships are central - both among people and in relation to their surroundings. This is manifest in new cuisine, where old household recipes are being remade in the latest restaurant, in Iceland for example (see e.g. Matur og Drykkur) and craft beer pubs abound using Icelandic micro-breweries springing up all over the country (see e.g. Skúli crafts bar). Clothing also reflects this as fashion stores have started to harken back to a bygone era of Iceland promoting fashionable woolwear.

In a sense many seem to be responding to the tourism influx in the country through donning a stereotype of hipster like wild Icelander, more or less springing from the cliffs. The marketing strategies of the tourism design and clothing outlet in Iceland Farmers Market (see [here](#)), their clothing line and way of promotion is a great indicator of these trends. A type of modern by tradition.

### **Consumer Trends for 2015 and Beyond**

#### *Boomers and Millennials*

According to Vend, a New Zealand company that deals in global point of sale, in 2015 retail will continue to be driven by the needs of two prominent generations: baby boomers and millennials. Quoting PwC, 'the Baby Boomer generation will age with increased financial resources and with a greater emphasis on youth and vitality than previous generations.' Retailers will need to consider how to cater for their needs and make retail experiences easier and more pleasurable.

Conversely, 'as a generation that grew up in an age where almost anything is just a click away, millennials have a tendency to be impatient' and retailers need to become increasingly 'mobile' in their advertising and selling.

#### *Scandinavian Lifestyle Trends*

Although dated 2014, Danish lifestyle magazine Bo Bedre's predicted lifestyle developments are still of interest. It predicts that:

'In the long run, we will live in compact 'smart connected' urban dwellings during the week and choose back-to-nature living – the wilderness, the mountains and the woods – in our leisure time.'

It suggests the following trends:

- *Betapreneur living*: eco-explorers favouring living 'back-to-nature', with everything artisanal, and favouring handmade and simplistic goods.
- *The good life*: 'hygge' hunters who place emphasis on community, 'deep contentment' and grow-your-own, as well as hobbies and experiences that major on nostalgia and tradition.
- *Lightweight nomads*: with a mobile lifestyle, nomads are seen to favour simple lives, defined by technology as an enabling cleaner, less cluttered living, where 'less is more'.

### *Business Macro-trends Snapshot*

A London-based but global trend consultancy, Kjaer discussed some of the current business and entrepreneurship trends likely to inform the short- to mid-term landscape, including:

- *Circular economy*: the promotion of green growth, majoring on sustainability and responsibility in our actions.
- *Collaborative culture*: more about 'access' than 'ownership', think: sharing and mobility. AirBnB and Uber are the current collaborative currency.
- *Conscious capitalism*: acknowledging that brilliant business models are driven by 'storytelling' and the development and fostering of networks and communities that support local trade and create both value and well-being.
- *Purpose-driven*: the development of businesses not to just make money but with underlying principles that benefit all stakeholders, inside and outside of the organisation, and give employees something to believe in and work for.

### *Global Consumer Trends*

The 2015 Euromonitor report out of the UK identified a number of global trends:

- *Buying convenience*: more shoppers appear to favour the convenience of shopping locally over having greater choice. Bucking the trend of the past 30 years, the number of local stores is set to rise significantly. In the UK evidence of this is found in many town centres and on petrol station forecourts, with small 'express' versions of supermarkets.
- *Greening it*: the rise of freecycling and upcycling.
- *Female empowerment as a consumer driver*.
- *Lightweight living*: as above, more of a concern for access not ownership, where collaborative consumption is equated with innovation, community, green values and convenience.
- *Vloggers*: youth culture is being transformed by the 'video-blogger' – more of a contemporary role model in many ways than actors or footballers.
- *Privacy matters*: in a world where millions share information, feelings and photos through their tablets and smartphones, privacy may well become a selling point.

## **c) Customer Typologies**

### **Scotland**

VisitScotland has undertaken a great deal of work on customer typologies, and has identified ten segments of the UK tourism market. Five of these segments it considers to be 'the best return on investment'. In terms of these 'warmer' consumers, the following three groups are believed to be more likely to be interested in slow adventure trips:

- *Curious travellers.* This is one of the most affluent segments, comprising free spirits who seek to broaden their minds, try new experiences and explore local culture. These consumers lie across a wide age range, while wildlife, walking and taking in natural sites are drivers for their activities.
- *Natural advocates.* With above average income and most likely to be 35-54, this consumer group likes exploring beautiful landscapes and getting away from it all. As they are characterised by enjoying slower activities and natural and beautiful landscapes, they could form an important market.
- *Adventure seekers.* Again, with above average income, predominantly under 35, and a propensity to explore new places, take active holidays and enjoy cultural activities, this consumer group could also be a key market. As a group they like active sports and landscapes and are more likely to consider camping as an accommodation option. They comprise 9% of the potential market.

As a consequence, targeting these more attractive customer groups should be characterised by promotion of 'authentic', rewarding and high-quality experiences in beautiful landscapes and with a strong cultural element.

## **Finland**

Metsähallitus research in national parks and nature reserves in 2012 identified four different segments: social self-developers, exercising nature explorers, nostalgia appreciative seekers of mental well-being and nature-oriented relaxation seekers.

- Social self-developers are predominantly motivated by pleasant old memories, improving their skills and experiencing excitement. A larger proportion participated in fishing and Nordic walking compared to the other segments. They were most actively participating in boating, gold mining, rowing and snowmobiling.
- *Exercising nature explorers* tend to be motivated by keeping fit, learning about nature, improving their skills and experiencing excitement. Hiking and orienteering, were the most popular activities. They were also most interested in bird watching, nature photography, canoeing, hiking and staying overnight in a hut or in the wilds.
- *Nostalgia appreciative seekers of mental well-being* were motivated by mental wellbeing, pleasant old memories and being on their own. They were most interested in activities such as picking berries and mushrooms, and walking with a dog. Compared to the proportion of members of other segments doing diverse activities, they were most interested in cross-country skiing and sun bathing.
- *Nature-oriented relaxation seekers* were motivated by nature experiences, scenery, relaxation, being with their own group and getting away from noise and pollution. They went picnicking and walking and visiting nature centres more than other segments. Other activities included enjoying nature, cultural heritage and history, swimming and viewing the scenery.

## **Future Traveller Tribes 2030**

A 2015 report by the Future Foundation for the Amadeus IT Group sought to identify non-country-specific, generic traveller groups or 'tribes' that will shape the future of travel. These tribes were contextualised against changes in the consumer and technological landscapes. The latter is more appropriately discussed in WP5, but the relevant consumer 'drivers' include:

- Changes in working patterns – greater choice as to when to travel?
- Bundling of travel options to simplify decisions
- More online networking – not using social media leads to alienation?
- Greater importance of peer power – review sites become more reliable and trusted
- More imaginative use of stories to sell products
- Greater ethical concerns

The six tribes identified are differentiated on the basis of factors such as demographics, attitudes, behaviours, needs and consumption. Of the six, two are believed to be less relevant: 'simplicity searchers', who want everything done for them, and 'obligation meeters', most notably business travellers. The four more-relevant tribes are:

- *Cultural purists*: this group of people use travel to break from their everyday lives and immerse themselves in new cultures or experiences. Open-minded and well-educated, they may resist too much planning, and many will seek experiences off the 'beaten track', with elements of the unknown or even danger.
- *Social capital seekers*: perhaps not as obvious a consumer group, nonetheless the desire to see 'spreadable content' in experiences will appeal, as adventurous experiences carry great potential social capital. For some, these experiences may be no more than rites-of-passage, going to new places in order to be, and be seen as, well-travelled.
- *Reward hunters*: while this group may be seeking 'premium', with appropriate connotations of luxury or indulgence, rewards can also refer to 'must have' experiences which can build ourselves mentally and physically, and to 'life-affirming experiences which transcend the everyday routine'.
- *Ethical travellers*: although few will change their travel behaviour so radically as to not fly, many in this tribe will seek an ethical dimension to their travel experience, through elements of volunteering or community development (by shunning 'big business' for example and ensuring their tourist spend goes directly to local SMEs), or by incorporating environmentally-aware activities into their vacation.

## 4. Primary Research Findings

### a) E-mail Panels

To recap, the email panel exercise involved engaging an external consultancy to send ten open-ended questions to participants in each of Berlin, Amsterdam, Sydney and New York who fit the socio-demographic parameters specified by the WP leader. After translating the German and Dutch

answers, the 1200 responses were thematically analysed. The ten following sub-sections present these findings, heavily punctuated by rich, direct quotes from participants.

### **1. In what ways are you interested in 'slow' movements such as slow travel or slow food?**

This question saw a wide range of responses, with many participants, across all four countries, seeming unsure or displaying antipathy and a sizeable minority being uninterested; most, however, relayed a positive response. Few however could elucidate their feelings, suggesting that quite a number didn't fully understand the question.

Those who did, saw slow movements as *'a means of destressing and getting away'*, giving *'time to take in all the moment, instead of rushing'* or *'a better opportunity to get immersed in the local culture'* (all Australian). One American participant described their fondness for slow food, and a useful analogy for slow adventure perhaps: *'I also enjoy eating food slowly to savour each bite'*. Another opined: *'living life at a relaxed pace is good for the soul'* (Amsterdam).

One German respondent did caution that *'we don't know how to simply enjoy'*. A large number of people used terms such as relaxing, healthy, senses, the moment, or (an antidote to) stress. As a Berlin resident put it: *'in our hectic life we need to pay more attention to slowing down and relaxing'*.

Overall, the notion of 'slow' in leisure activity, from travel to eating, elicited favourable response across our four urban survey populations.

### **2. What is your interest in wild lands or wilderness (and why)?**

Perhaps unsurprisingly, given the geographical nature of the four countries studied, the terms wild or wilderness elicited more negative or ambivalent responses in Germany and, in particular the Netherlands; is this unsurprising in them being far less able or unable to experience it in their homeland, or perhaps surprising that, given this paucity, they do not seek in their travels elsewhere? Quite a few Sydney residents also felt no interest in wild lands, perhaps an indication of the extreme and inhospitable nature of the wild areas of Australia's interior.

Wild lands are seen as offering something different (*'being in a totally different atmosphere seeing trees flora and animals I can't see in everyday life'* (Sydney)), challenging, beautiful and, above all perhaps, natural: *'the discovery of nature is a great experience that is not often possible in our lifestyle, it makes us crave it and feels more pleasing'* (German respondent). This was echoed by a US respondent, feeling that *'untouched nature is beautiful and inspiring. Living in New York City, one needs that kind of getaway'*.

A few participants associated the term wilderness with adventure, and the correlative notions of uncertainty; one suggested that, as a city dweller, he or she would want a guide: *'I would want to learn as much as possible about the area'*.

One American respondent did sound a note of caution. While stating that he or she likes *'to look at them and take photos of them'*, it was felt that this was *'because I'm afraid they'll all be gone soon'*.

### **3. What are your feelings about the magic of the 'great outdoors'?**

Many of the responses to this question suggested that they didn't really connect with the term 'magic' in the context of the outdoors, across all four cities. Clearly, however, the term did chime with some.

As an Australian respondent stated: *'the great outdoors can let you find yourself in a busy world. Let's you capture experiences that can be remembered forever'*. A New Yorker felt that the magic lay in *'you never know what you will see'*, while a German respondent equated the magic of the outdoors with the 'basics' of life: *'the daily performance of nature, breathing, living'*.

Fellow Berliners considered that you don't have travel into the 'outdoors' to witness this however: *'even in big cities I manage to find mushrooms along the pavements, wild flowers in cracks, that is magical'*, and *'nature itself is magical. It's enough for me to hear the birds sing on the balcony in a city. I don't need to be in the wild for that'*.

Other terms used to try to capture the magic of these experiences included *'living life at a slower pace'*, *'being able to eat outside in the evening'*, *'being outdoors without people around you'* or *'sleeping outside'* (all Netherlands). Three German respondents listed their key elements of magic:

- *'clear and fresh air, morning fog, sunrise and sunsets'*
- *'untouched nature, fresh air, nativeness, the quiet'*
- *'the birds singing, the quiet, calm running of a stream or a relaxing sunrise'*

This 'quietness' resonated with a few residents of Berlin, one going on to make the link with inner well-being: *'the quiet is magical itself that will set inside you after a while as well'*.

Finally, one respondent (USA) succinctly elucidated his or her feelings on the matter: *'magic is magic. It trumps anything that mankind can do. And it especially beats any phony jungles that Disney can build'*.

#### **4. What are your feelings about the stories about the 'great outdoors'?**

Again, this question prompted a range of responses with many people unmoved by narratives of the outdoors or happy to take or leave them; this was a little more prevalent among German and Dutch participants.

While some felt that people's 'heroic' stories of the outdoors can become exaggerated contortions of reality ('there are so many cock-and-bull stories but I still like hearing them' (Berliner)) or distort the nature of such places (*'I need to see it myself to believe any hype'* (Australian respondent)), a number of people found them to be either interesting, *'full of adventure'* (Australia) or inspirational.

Quite a number considered that this informal exchange of information and experiences is so important (*'you can gain information and knowledge that is not in any travel guide'* (Germany)), and took pleasure in both listening to the stories of others and regaling their own adventures. One Dutch participant considered the importance of chance opportunities in learning about places and the people who dwell there: *'nothing teaches you more about your surroundings than an overheard conversation on the bus'*.

A Berliner warned about the dangers of sharing knowledge, akin to those newspaper articles about 'secret places': *'not really [interested]. If people blabber about their heroic experiences, it isn't untouched anymore'*. This did not appear to be an opinion shared however.

The many positive feelings evoked confirm the rousing nature of stories, verbal or penned, to many people. However, as one Sydneysider quite rightly stated: *'stories are one thing, but experiencing these things in real life is something completely different'*.



**5. From your own travel experiences, what kind of 'stories' – that you hear or that you tell – are important, and why?**

Following on from the previous question, and ignoring the negative responses that represent 'N/A', the responses fell under a number of different themes:

- *Inspirational experiences: 'stories relating to places of history, beauty and experiences whilst travelling should be told as this will encourage other people to travel to these areas and gain a more rounded life experience', and 'The best stories are usually those which involve unique experiences about people, and the environments in which they exist'* (both Australian participants)
- *recalling encounters: 'mostly stories about the people I meet'* (American respondent), and *'adventures of meeting bears, whales, bison, penguins or albatross'* (German participant)
- *hardships: 'it is nice to hear real stories from small beginnings to overcoming challenges'* (Australian participant)
- *tales to preserve traditions: 'stories are sometimes important to understand certain situations and to stimulate certain actions. For example, with the dying out of traditions or the disappearance of myths'* (Dutch respondent)
- *the unexpected: 'my favourite travel stories are always the unexpected find or experience -- they bring complete surprise and joy'* (US respondent)
- *meaningful or deeply personal experiences: 'people prefer telling stories about important experiences. Their joy, their sorrow, their hope and in particular ... their fears'* (Dutch respondent)
- *darker or more morbid tales: 'what people do to survive'* (Dutch respondent) and *'experiences with death - to prevent others from walking down the wrong path'* (Australian participant)

Perhaps related more to everyday news reports, one American felt that *'most stories dealing with nature are negative: rescues of careless people (or the removal of their bodies), damage caused by human negligence, overcrowding'*. It suggests a good deal of scope for more inspirational narratives that convey the positivity associated with wild lands, evidenced by so many other responses in this research exercise, as an antidote to everyday societal ills.

**6. How interested are you in doing activities or learning outdoor skills such as lighting fires, setting camp and gathering and eating wild foods, and why?**

Another divisive question, with many respondents showing little interest in bushcraft skills, across the board but especially amongst Amsterdamers. While many of the negative respondents were rather perfunctory in their reply, others did go on to explain. For example, several people knew these skills from the military, others value their urban lives (*'no need for that, I am a city person and want to be one till the end of my life'* (Berlin)), and several more used the term 'comfort' to describe their (ideal) outdoor experiences (*'not really interested as I now like the comforts of home when on holiday'* (Sydney)). This last point resonated amongst a few respondents, witness this Dutch response: *'I don't go that far. Yes to a starry sky, but I light the fire with a lighter. I do camp but I don't shoot animals and don't gather food'*.

On the other hand, many participants did express interest in learning such outdoor skills. A couple of people advocated that it is *'always good to learn new skills'* (Germany), while another, from Sydney,

felt that *'it's something most of us never have the chance to do'*. Again, doing or learning something very different to people's everyday routines or strictures appealed to a number of these urban dwellers.

Some responses, however, appeared to suggest a romanticised notion of their application in the great outdoors rather than a skill that they actually intend to use:

- *'if I need to survive then I would have a good chance of staying alive'*
- *'it would be handy, should I ever find myself in a situation where it was needed'*

As one German stated *'it reminds me of unburdened freedom and quiet of the past'*, for a small number of participants the question appeared to evoke memories of skills or knowledges once held but now perhaps rather redundant.

## **7. What kinds of television programmes or media articles influence your holiday or travel intentions, and why?**

While many participants across all four cities replied negatively to this question, those in Amsterdam were particularly vociferous in this regard. No reason was generally given, but those who did felt that the reasons for not seeking or finding inspiration from the TV or written media included the fact that articles or programmes are 'sanitised' (Sydney) to this more explicit comment:

*'None. Most such shows (if not all) are doctored to make things look 'better' than they actually are. National Geographic is a good example, how they use bait to attract the animals they are videoing. I refuse to watch them'.*

No participant was particularly effusive about media articles or programmes in their homeland. Australian TV programmes such as Getaway or The Great Outdoors received mere mention, as did generic US travel shows on TV. Lonely Planet guides were also mentioned by a couple of Dutch respondents. While most participants weren't very forthcoming in their responses, one German did suggest that popular media could inspire a travel decision: *'sometimes I watch telly and I see a region or an island I didn't know about or read in magazines interesting things about my... environment that could influence my destination'.*

Rather than travel programmes, a small number of respondents felt that documentaries were more persuasive media tools. As one person put it: *'some documentaries arouse my curiosity. I trust them because I don't think they are trying to sell me a ticket'* (USA).

Finally, one Australian voiced the opinion that:

*'Television programmes or articles do not tend to influence me that much. I tend to go on holidays to places where I want to go and perhaps more influenced by other people's experiences of a holiday destination'.*

It provides further evidence of the power of word-of-mouth, or more recently word-of-mouse recommendations in our increasingly connected world.

## **8. What do places such as the Highlands of Scotland or the Fjords of Norway mean to you?**

It is instructive to note that very few respondents had *no* image in mind of these northern peripheries; it is equally *constructive* that there were few dissenting voices in terms of their opinions; those that were pertained to views of *'somewhere far, far away'* (Australia), somewhere people had been before, or the weather: *'cold, much too cold, brrrr'* and *'beautiful, but have experienced too much bad weather'* (both Netherlands).

While the nature of the question may have prompted respondents to just list attributes, rather than expand on their meaning, the vast majority of responses related very positive perceptions, under a number of core themes:

- *unknown or novelty: 'just an unknown part of the world - excited to learn about it'* (Sydney), and *'mostly novelty. I don't think I've experienced anything like either of those destinations, so I would hope to be startled by something new and unknown'* (New York)
- *beauty and majesty: 'Norway is a bit cold but would be beautiful'* (Sydney)
- *wild and rugged: 'these are wild and exotic, and I would really like to see the Scottish Highlands'* (Sydney), *'rough country, untouched'* (New York) and *'the Highlands have a beautiful rough nature and luckily there are no beaches [sic]'* (Berlin)
- *pure and clean air: 'pure nature'* was posted by Berlin and Amsterdam residents
- *nature: 'thinly populated, still a rich flora and fauna. Beautiful hiking'* (Amsterdam)
- *ancient lands: 'magical places that are ancient', and 'ancient stories, untouched nature and especially vastness'* (both Berlin)

Perhaps surprisingly, only one American or Australian respondent mentioned family ties (to Scotland).

Two respondents did mention that the 'north' is on their must-do list: *'Scotland especially is on my bucket list, it's a place also like Norway that you would want to visit and explore'* (Sydney), and *'don't know them, but they are on my list to go visit ... the nature there attracts me'* (Amsterdam).

## **9. How important is it for you to spend time in natural spaces?**

A few participants in each of Sydney, New York and Amsterdam considered being in natural spaces to be *unimportant* to them; somewhat surprisingly, rather a large proportion of Dutch respondents felt the same. Two of the latter were clearly 'city-folk': *'am at my most relaxed as when in a city with 25 million inhabitants', and 'not really into areas of nature, more about hustle and bustle and cities'*. Clearly wild lands, and what they represent, are not for all urban dwellers.

The vast majority of participants, however, took an antithetical view. Again, the nature of the question perhaps discouraged deeper responses, but it was clear that getting back into nature was important or very important for so many of the participants. Core themes included relaxation, destressing and obtaining balance and perspective.

An Australian opined that it is *'very important so you have to time to slow life pace down and absorb the beauty around us'*, while a German respondent felt it *'good to get away from the routine of my hectic day to day life'*. An Amsterdam inhabitant considered it *'very important. It keeps you fit. Time to recharge your batteries. It is wonderfully peaceful and only yourself to worry about. Time to focus on yourself'*. Taking this 'time out' is seen as a way of *'putting balance back into my life'* (Australian respondent).

As one Dutch participant put it, in the context of the urban frame of their lives: being in nature is *'essential to cope with good city living'*.

## 10. How important is it to be 'active in nature' on your holiday?

Perhaps rather surprisingly, more Dutch respondents felt that being active in nature on holiday was of little importance than those who considered it of import. To a much lesser extent the same was true of inhabitants of Berlin, New York and Sydney. While some of these respondents just felt that it was not an important factor, some qualified their responses, stating that it depended on the type of holiday or that it could be a part of a holiday; indeed, some stated, for example, that they just '*prefer relaxing by the pool or on the beach, 5 stars all inclusive*' (Dutch respondent). A fellow Amsterdamer felt that being active would be '*fun for something different for a couple of days during the holiday*'.

A large number of respondents, particularly those in Berlin, felt, conversely, that being active in nature was an important vacation component. Most of the responses were relatively unforthcoming, but some extended 'very important' as a response with explanations such as '*it eases the stress*' and is important '*during the day*' (both American respondents), the latter suggesting the desire for an activity/comfort balance. At the far end of the spectrum were those people for whom being active in nature is the only way: from '*that is the only reason*' (German participant) to '*any good holiday should be active*' (Australian respondent).

Interestingly, in the context of this project, only one participant (from Australia) took a Scandinavian-like view, and felt that 'being', rather than 'doing', in nature was enough, or even the goal: '[being active is] *not necessary - you can be on a picnic at a beautiful place but absorb the nature. You do not have to be active in nature but be a part of nature*'. While maybe a negative response to this particular question, that kind of attitude clearly complements the ethos of slow adventure.

### b) Qualitative and Ethnographic Research

As a reminder, qualitative research, incorporating elements of ethnography, was undertaken by partners in Northern Ireland, Ireland, Finland and Scotland, to interview participants regarding, and observe them on, a range of slow adventure activities, including sea kayaking, canoeing, foraging and wildlife-watching. The full responses are available in separate reports.

#### 1. With increasingly urbanised and technologically driven-lives, as well as the packaging of tourism and holidays, it could be argued that opportunities to spend time living in nature are rare – maybe even a luxury. To what extent is that true for you?

The following themes were identified:

- Making time for nature
- Time in nature is activity driven
- Nature as a central element already in one's life
- Working lives as computer driven
- Desire to be in nature more often
- The importance of seeking a work-life balance
- Nature as a re-energiser
- Work-life balance
- De-stressing
- The expense of spending time in nature

In Ireland, all of the respondents stressed the importance of spending time in nature to enhance their lives. Those that have immediate access to the countryside because of their home locations referred to nature as being central to their lives despite the lure of technology and television, and they refuted the above statement. Of those that do not live in the countryside, the response was more ambiguous. On the one hand they agreed with the statement, citing that the achievement of a work – life balance is challenging in modern life, particularly in terms of the demands of a busy working week, looking after the family and extended family responsibilities. But all stated that they make time to get out into the natural environment on a regular basis (eg: early morning, lunchtimes, evenings, weekends and during holidays). Being close to nature is something that all of the respondents continuously strive for. In every case a primary motivation was described in terms of de-stressing.

*‘Every Saturday morning too my husband and I go cycling on normal bikes. I find it very de-stressing because when my legs are screaming at me, it’s hard to think about anything else like what’s going on at work’ (Jenny, Electric Biker).*

On a more literal note, two respondents mentioned the expense associated with some forms of outdoor opportunities, and that such activities can therefore be defined as a luxury and/or rare.

All of the Northern Irish respondents agreed that they actively seek out time to spend time in nature. In most cases this time is spent doing outdoor activities such as walking, kayaking or biking. Some respondents work in the outdoors and described time in nature as a central element in their lives. This was also true for those that have chosen to live a predominantly rural life.

Some respondents referred to their working lives as computer driven. One respondent described his life and work as *‘totally governed by social media and ‘head fry’ material’* (Nick, Open Canoeist). Being outdoors gives people a chance to declutter: *‘We work so much to a schedule in our lives. Here though, there was no hurry.’* (Orla, Mindfulness in Nature Course), a feeling shared by Carla (Bat and Moth Walk): *‘We rush, rush, rush. We have to learn to slow down and enjoy it.’*

A desire to spend more time in nature was a recurring theme as was the importance of seeking a work-life balance.

*‘It’s terrible, I live in the middle of the countryside but I do not get out into it half as much as I would like. I use the computer a lot through work and then when I’m not working I’m on Facebook and social media’ (Mary, Hill Walker).*

Con (Walking Tour Guide) admitted that *‘I increasingly spend more time in front of the laptop, so sometimes nature is on screen as opposed to me being in it.’*

A number of respondents referred to spending time in nature as re-energising. George (Wild Food Forager) described it thus.

*‘My work though is very desk based so I am on the computer all day. I love to get away from it when I can. I know lots of people who work like me but never make time to get out into the countryside. I don’t know how they keep going. I love how it re-energises me’.*

Participants in the Norwegian research were from a variety of countries. A response from an overseas tourist suggested that opportunities are driven by: *‘the lack of snow here [at home], and the*

*Norwegian nature and all its possibilities are luxury. We travel to Norway as often as we can'. This was supported by a Norwegian respondent: 'it's not true for me, because I'm used to it, but for the people that I bring with me, it's important'. A city-dweller explained the attraction of natural surroundings: 'it's important, because I am living in a city. Lots of the sounds in nature are rare and also even an exclusivity'. Another German participant explained in more detail:*

*For us it is actually a luxury. Here in Central-Europe, where we live, you don't have that kind of luxury. So for us it is really a luxury form of holiday... It's in a certain way 'coming home'... If I'm looking around, to the job and the area here, there is always a certain stress level, and going into the wild nature, which is most probably Norway for us, sometimes Greenland or Iceland, it's a total change of standard of life. So, no mobile phone, no internet, no no no no, all the things stressing you all the day... We just can leave that at home or at the airport or wherever and go from there on. Just go out into nature'.*

## **2. Did that play any part in choosing this trip/activity/adventure? If so, how?**

In Ireland, in the majority of cases, respondents were open to the opportunity of trying something unique and new in nature, and this was a major reason for their choosing a particular guided course or activity. Others reported that their lifestyle choices already ensure that they are close to nature and regularly engaged with it and they therefore do not need an external reason to engage. One respondent talked about a series of 'reference points' he has developed from his training in the outdoors and that these are what he relies on when making decisions about any trip, activity or adventure. These are points from which he gauges the intensity or commitment required to participate safely in that outdoor activity at any given time. Examples of these reference points include the weather, water levels, wind and one's physical condition. Participants talked of other motives for choosing particular activities such as seeking out new perspectives (eg. from the water), re-charging one's batteries through relaxation, and as an introduction to another type of culture.

The majority of Northern Irish respondents stated that their primary motives for participating in their chosen activities was because of their love of nature and desire to spend quality time in it:

*'A heron accompanied us all of the way down the river. It was amazing to be so close to him. We paddled across Lough Gill to Church Island and had a picnic. It was wonderful, stunningly beautiful, especially the glassy calm of the water'* (Nena, Open Canoe Course Participant)

A willingness to give it a go and learn new skills and knowledge was also a dominant theme.

*'I have a good idea about river environments, but I wanted to know more and I wanted to understand the hill environment too. I did the walk last week and the following Sunday on the river was amazing. I had such a different understanding'* (Lisa, Geological and Natural History Walk).

A work/study motivated theme emerged for those whose work is related to the outdoors. Con (Walking Tour Guide) referred to the task of striking a balance between work related and personally motivated participation.

*'My background in the last good few years has been largely to do with heritage and people and place and I suppose, for want of a better word, environmental anthropology or people's*

*connection with place. So on one level, I have done that in an academic way and still do it, but in another way, I want to do it for real. I just don't want to write about it, I want to do it'.*

Another emergent theme was that of participation as an escape from the everyday pulls of life.

*'Yes, I needed a release, to do something completely different, something that would take me away from everything. In the hills there is no technology, no work. You are just out in nature, drinking in all of the beauty (Mary, Hill Walker).*

For Norwegian participants, some responses suggested that the physical surroundings are important, but are often connected to a special guide or a local place that means something more. One participant was focussed in her response as it was the lack of snow at home that prompted a trip north. One participant was very honest in her answer regarding her motivation to get out:

*'Yes, I feel that's true for me. I need a kick in the butt to get out! I am not – well, it needs to be something, like moose hunting or anything like that, yeah. I don't just go out for a walk, it has to be something happening, something that draws me out'.*

### **3. What did you hope to experience on the trip?**

Given the diverse range of experiences involved in this research, a wide range of expectations arose in response to this question.

Themes:

- Self-time
- Time with friends
- Desire to learn
- A sense of the elements
- Exercise and fitness
- Sense of connectedness to place
- New possibilities
- A new activity
- Nature
- Quality time

A wide range of slow adventure activities will throw up a wide range of personal motives amongst participants. In the case of these studies, the following activities were investigated: canoeing, camping, hillwalking, stand up paddle boarding, fishing wild food foraging, electric biking and birdwatching.

One Irish respondent talked about their initial narrow focus which was based on just wanting to sample the electric bike experience in preparation for an upcoming holiday. However, the experience was so positive that it opened up *'a whole new set of possibilities'* for herself and her husband in terms of cycling throughout their advancing years and into retirement (Jenny, Electric Biker). Other respondents stated that they just wanted to have a go at a new activity or to experience and to enjoy the physical act and achievement of self-propulsion in sports such as canoeing, stand up paddle boarding, and electric biking.

The draw of nature was again to the fore in many of the responses regarding their hopes and expectations for their sought adventure experience. Similarly, an interest in furthering one's knowledge of wildlife, specific habitats and the natural environment was important. Spending quality time with family and friends was another prominent theme, but equally favoured was the prospect of enjoying self-time.

Some Northern Irish respondents talked about their expectations in terms of the need for self-time or self-indulgence, relaxation, renewal and refreshment, as Ben (Wild Mushroom Forager) described:

*'You're kind of immersed as well. I was just thinking about it walking back, you don't really think about work and all that kind of stuff. For the day, you know, which is a great kind of escape I suppose.'*

Mary (Hill Walker) took up hill walking to do something completely different from her normal every-day life. On joining her local hill walking club she stated:

*'I wanted to take a deep breath. There are 7 days in the week, I just wanted one part of that week for myself. It takes just half a day and during that time, I get to take one big deep breath that lasts me the whole week, until the next time.'*

Spending quality time with friends was another noted intention. One respondent recounted the experience of a re-union and renewal of an old friendship through an adventure journey together.

*'I did the trip with an old buddy of mine with whom I have enjoyed many previous trips but not for 20 years or more. We wanted to go back down the river. I wanted to drop all the social media, put down my phone, stop tweeting and to experience our friendship again in real time'* (Nick, Open Canoeist).

The anticipation of learning something new was also a prominent expectation. This included the learning of new skills, knowledge (particularly related to the outdoors) and experiencing new challenges.

When asked about what he hoped to experience whilst sea kayaking, Rick focused on a sense of the elements around him and his strength and fitness to contend with them.

*'Ah that lovely feeling of salt on my skin and the sea underneath me... I also love to feel the power and strength of my own body pushing the kayak through the water. I love that fitness side of it'* (Rick, Sea Kayaker).

One guide had a strong sense of the historical connectedness between people and place and hoped that this is what his clients would experience through their adventure.

All the respondents in Norway had expectations related to the activity they had chosen. For the two who were on a bear safari they had low expectations beforehand, since bears are something that is hard to see in Norway. They just wanted to join an activity that they haven't done before. For those who were on the expedition training the main expectation was preparation to be able to go on an expedition: *'the expectation was to train surviving in snow, in the cold. In general, yes, it's coming off, what is it in Norway, the Tredemølle? Coming off that'*.



For those who were at Flatanger they had expectations about seeing and taking pictures of eagles; however, they knew the place, so there were also expectations related to both the guide and the area. A guide responded:

*'As a photography tour organiser/leader all I can ever hope for is that the guests I bring to Norway enjoy themselves, have a good time, take a very large quantity of images that excite them, and return home wanting to go back again'.*

#### **4. Name four highlights of the trip in terms of your experiences in the outdoors.**

Many highlights were revealed and have been grouped as follows:

- Beauty of nature and experiencing nature
- Sharing with others
- Celebration of friendship and interaction with others
- Escapism
- Learning
- Heritage
- Fun
- Activities
- Facilities

#### *The Natural World*

In Ireland, spending time in the natural world was the most common highlight quoted by those interviewed. In terms of the natural world, the following three categories were identified:

- *The landscape*: this includes the aesthetic beauty of the uplands, the lake-river-canal scape and the rural countryside. A recurring highlight was the quietness of such environments.
- *Wildlife*: many interviewees experienced expressed joy at witnessing wildlife in its natural environment, or even evidence of it. Examples include birds such as herons and kingfishers on the rivers, fox prints in the upland peat, peregrine falcons and red grouse in the hills, and trout, perch and salmon in the rivers and lakes.
- *Flora and Fauna*: smelling honeysuckle, tasting blackberries and wild mushrooms and seeing the flora and fauna of various habitats such as the river bank, road side and forest floor were also highlights.

Molly (Stand Up Paddle Boarder) waxed lyrical about the weather and how what many perceive as a reason to stay indoors is, for her, a reason to be in and embrace the elements:

*'I used to hate the rain. Now I love it, it is so beautiful when you are out on the board when it's raining. It makes a beautiful sound on the water. You just don't care! It is such a great way of travelling. Sometimes I can travel faster than someone who takes a car and gets stuck in traffic. I know someone who does their shopping this way.'*

All of the Northern Irish interviewees talked about the beauty of nature in its various guises from sunset to moonlight, beaches to boggy mountains and included descriptions such as the light, colour and sounds of nature: *'[It] doesn't matter where you go in nature or what you see, nature is nature*

and it is all-important. It doesn't need to be dramatic, immense' (Sean: Kayaker). Others suggested more elemental considerations:

*'I think the weather makes it magical sometimes too. I love walking in the rain, it doesn't bother me at all. I love different weathers too like the sun, the snow, the hail, the wind. I love the feeling on my skin'* (Mary, Hill Walker).

These descriptions often went hand in hand with descriptions of experiencing nature through wild food such as the taste of berries and having close experiences with domestic animals and wildlife, and in one case, the shock of being stung by a wasp.

*'I am interested in trees, flowers, wild mushrooms, birds and wildlife. I am always looking up things in wild life books. I had heard about the wild food foraging course from someone who did it before. They highly recommended it, so I did it... There was so much birdsong. Sometimes you just don't listen. It was there all the time but when we stopped and purposely listened, it really was amazing'* (George: Wild Food Foraging).

For the Norwegian participants, while selected activities defined the highlights, it was also about the physical surroundings. For those two who attended an eagle safari, for example, the important draws were the eagles and the place itself, as well as the professionalism of the guide. For those two who were on an expedition training it was essentially being out in the snow, seeing the aurora and animal tracks, experiencing the cold temperature, and just to be there. For those who were on bear safari it was the natural surroundings, the peacefulness, and the stories and way of being of the guide that formed the highlights.

### *Activities*

The activities or courses undertaken by the Irish interviewees acted as metaphorical vehicles to gain access to the landscape. Getting there *'under our own steam'* (Nena, Open Canoe Trip) was a prevailing theme. *'All I had to do was hit the power button and climb the hill to Arigna effortlessly'* (Jenny, Electric Biker). Despite the physical exertion and challenge of some of these activities, many referred to the sense of relaxation that came with such activity.

A Norwegian respondent highlighted the importance of a professional guide in facilitating and adding to her experience:

*'the guide was a highlight herself. She was a good speaker but she also let us walk a bit alone in our own mind. We could ask her questions and she gave us good knowledge on the bears, where it walks, how shy it is and so on'.*

### *Escapism*

Statements about finding a sense of self and a sense of freedom filter through-out the Irish interviews for both male and female interviewees. Respondents talked of a heightened awareness of the self in and through nature, freedom from the pulls of everyday life and work (*'My internal body clocked slowed right down. I had no idea what time it was and I didn't care'*). Jenny, Electric Biker) and a setting that is conducive to mental relaxation and calmness:

*'I felt happy and safe. I felt relaxed. My worries all fell away. I want to do it again. I want to walk and canoe. It was an amazing experience. I felt peaceful, quiet and alone. I felt excited too. I felt a right buzz after'* (Millie, Open Canoe Course Participant).

*'It lifted my spirit. Happiness, relaxation, peace, a Zen like way of being, at one with the Planet. There was no traffic, no cars or planes, just our chatter and the splash of the paddles. Serenity is the word I think'* (Nena, Open Canoe Course Participant).

A strong sense of self-awareness, escapism, mindfulness and freeing one's self from the pulls of life and work were highlights for some of the Northern Irish interviewees. Discussing her Mindfulness and Connecting to Nature course, Orla described it as a *'window in my week to self-indulge and navel gaze'*, as if it were a *'facial for the brain'...* *The course really allowed me to empty my brain'*. One respondent described how her time in the hills helps her become aware of who she really is and another explained how participation in adventure activities gives you a different perspective on things.

In Scotland, for one group of sea kayakers the islands they visited seemed to represent a place separated from their normal lives: *'Just looking at the map I get a sense that these Islands are a.... a kind of different space. We have to cross out to them and that crossing could have just been like paddling through some kind of portal, that's how far out I feel we are right now.'*

This desire to escape, however, may well be *'not-at-all-costs'*. One client on the Scottish sea kayaking voyage smiled with a few common words of relief at reaching dry land and then, possibly with no sense of conscious choice, reached into her pocket and removed her mobile phone to look at the screen. She had no signal but engaged in a ritual of lifting the phone up in the air, just to make sure it failed to connect. The guide chose this moment to point out what was suspected to be a young Golden Eagle following the line of cliffs above us. There was a startling moment of symbolic tension, with phone and eagle now vowing for attention. While this may seem rather antithetical to the ethos of slow adventure it is nonetheless an increasingly important consideration.

#### *Interaction with Others and Friendship*

Interaction and engagement with local people and like-minded others was something that enhanced the experience for many Irish participants. The curiosity of the locals was welcome for an electric biker; the professionalism and empathy of outdoor guides was also important.

*'The tutor was a twinkly eyed German and he had such a way of bringing things to life. He is so much part of Ireland, completely at home here. He has such a presence and way of being, and passion'* (Helen, Wild Food Forager and Nature Lover).

The joy of participating in and sharing outdoor experiences with children was a particular highlight for some of the Northern Irish parents interviewed. One mentioned her pleasure at seeing the interaction her children had with other children during a walking activity and the wonder she felt when the tutor asked her little boy to release a captured moth into the night air. A father talked about the joy he feels when he goes geocaching with his son.

*'When my son was younger, he hated going for long walks. Now he would walk for miles if he knew there was a geocache at the far end. That makes me very happy, that we can do this together and both enjoy it (Lewis, Geocacher).*

Some of these Northern Irish comments highlighted the celebration of friendship. Sean talked about being carried along with his friend's enthusiasm during a recent kayaking trip and how it reminded him of the outdoor joy he had become a little 'blasé' about.

*'I really remember my friend's enthusiasm. He used to paddle but had not paddled for a long time. Seeing his excitement and joy, through his eyes, I really enjoyed that. It reminded me to stop and appreciate things all over again' (Sean, Kayaker).*

On a more philosophical level, Nick highlighted his experience of the parallel journeys of adventure and friendship during his recent two-day open canoeing trip with an old friend.

*'Another highlight was the whole idea of the journey, the journey from fresh to brackish to salt water and our own journey of friendship. The feeling of resolution was immense when we got to the ocean, and also between ourselves as grown men' (Nick, Open Canoeist).*

Visitors to Norway also highlighted how the interaction and engagement with others could be an important element of the experience: *'I like the Norwegian people and their attitude – not only to outsiders like me, but also to themselves' (UK male).* This was echoed by another UK-based participant: *'I love everything about this area/region – I love... the general atmosphere with is created by the combination of the physical place and the people who live there' (UK, male).*

This was further illustrated on participant observation on a sea kayaking trip in Scotland. Participants stayed a night in a bothy [mountain hut]. The bothy was a basic building with no running water, no toilet and no electricity. It was shell of a building with a few chairs and a wooden sleeping platform. They prepared and cooked a meal, each group member helping to prepare the meal. The night was spent in the bothy talking as a group; digging into their pasts, telling stories and discussing their knowledge of sea kayaking.

### *Heritage*

Leitrim's mining heritage was a big draw for some of the Irish respondents who were fascinated by the mine workings and conditions in which employees lived and worked. Other referenced highlights included mass rocks from Penal times, local mythology and folklore and the Viking history on the Shannon.

*'There is a mass rock that was used in penal times on the way up Slieve an Iarainn. It is fascinating to learn the history. It is a hidden gem. There is an old coal mine too and the left over workings are there, the shaft, really fascinating' (Harry, Hill Walker).*

The infusion of folklore, history and a sense of place with slow adventure activities was something that many of the Northern Irish interviewees enjoyed and quoted as highlights of their trip. In all cases, these comments arose in the context of guided adventure experiences. It reflects favourably on the guides themselves, their knowledge and their ability to impart it. *'Our tutor was really good. She was a good teacher and really knew her stuff. I liked how she linked folklore with everything. The*

*stories really help you remember'* (George, Wild Food Forager). As a walking guide, Con has thought a lot about our connectedness as people to each other and to the land. He builds on this philosophical pillar as a guide.

*'I sometimes like to feel part of all of the people that went before us, and that's happened to me a few times. Again, I kind of feel small, I'm just treading on this ground where other people have tread before me'.*

### *Education and Learning*

Many of the Irish respondents undertook guided courses or trips. Much reference was made to new skills sets gained such as stand up paddle boarding skills, and the development of deeper knowledge of particular topics in interests as wide ranging as wild food foraging to red grouse habitats. This sense of getting something from the activity or course was a strong theme through-out the interviews.

*'Red Grouse is a bird that interests me. I know a lot about other birds such as woodcock, pheasant and snipe. This was an opportunity to learn about Red Grouse, its habitat and the project here in Leitrim to conserve their numbers. The numbers have so improved, the grouse are doing so well, it's fantastic. The course was very informative and educational and that is what I wanted'* (Aoife, Hill Walker and Bird Watcher).

*'I was kind of coming at it open, to learn another kind of aspect of nature, to learn about things you see but you don't know what they are. Like I would have a fair knowledge of the trees you see growing around here and some of the flowers that you would see, some of the birds, but I didn't really know anything about the mushrooms and you know it just makes your experience, like on a walk, just more richer [sic] again, like you know these things and also like the fact that you can eat them too, brilliant'* (Dan, Wild Mushroom Forager).

Many Northern Irish respondents described the learning of new skills or knowledge as highlights. Lisa referred to her interest in learning in terms of her work. *'The archaeology sites were fascinating too. I love the history associated with them. I work in tourism so now I will be able to pass on my knowledge'* (Lisa, Geological & Natural History Walk). On the other hand, Zoe was just happy to learn a new skill for herself. In this extract, she describes how it felt when she mastered the art of stand up paddle boarding:

*'I loved it when I got the hang of it. I loved the feeling of being out there. The water got calmer and calmer and stiller and stiller and I loved just feeling the board move through that very calm water. I think there's something very aesthetic about it all, and it's really, really beautiful being out there. I just liked getting the hang of it, and I really liked learning a new skill and improving as I went along'.*

A willingness to learn something new, meet a personal challenge and achieve something were themes that arose quite regularly through-out the other interview question too.

A Canadian respondent in Norway shared her thoughts:

*'Going with Geir... sharing his expertise on animal tracking and that was very good, as well as doing all the technique, and looking at – and I'm very personally interested in that – so looking at winter tracks. And then ventured at night for skiing and Northern Lights, that was very nice as well! And just the location was wonderful, the cabin was so nice'.*

## Facilities

Surprisingly the standard and availability of facilities was not a prominent theme in the majority of Irish interviews. Facilities along the Blueway and Shannon were instrumental in the enjoyment and safety of Andrew's open canoe and camping trip, but he did make suggestions that would attract more paddlers to the area.

*'The volume of visitors will increase but there are limits in terms of resources. The Blueway is not near its limit yet but as the volume increases we need to consider opening semi serviced campsites between the serviced campsites every 10 or 15 kms along the river, where agreements with landlords have been arranged. A rudimentary toilet, a tap, a bin and a flat patch for camping such as they have in Norway' (Andrew, Open Canoeist and Camper).*

## Fun

In Northern Irish responses, the theme of fun arose most often in the context of enjoying adventure with children, but Ben described the mirth and giddiness he enjoyed during a stand up paddle board course for outdoor instructors (all adults).

*'We had such fun. I loved throwing people into the water! I also loved paddling in under the water fountains. That was a laugh because you could soak people by angling the paddle in the flow. I really love the fact that you can travel on these boards, they are brilliant'.*

## Novelty

A German couple visiting Norway explained how they loved the country because it offered something that they just couldn't find back home:

*'The snowstorm, the cold, the temperature. And 99, 5% of the people don't understand this! Because they want to go further south, for twenty-five degrees plus – thirty degrees plus. But that's it. And yes, my wife adds the fantastic views we had, even in the night, the stars. Which you cannot see here, because there is too much light around, yes'.*

## 5. What emotions did they prompt?

Many emotional states were reported and are grouped as follows:

- Joy (happiness, contentment, satisfaction, joy, giddiness, playfulness, curiosity, pleasure, excitement and fun)
- Peacefulness (relaxed, at ease, free, calm, mellow, spiritual, awe-inspired, self-aware and reflective, escapism, time alone, time to think, zen-like, serenity)
- Thankfulness (gratitude, appreciation)
- Mental and Bodily Strength (confidence, focus, strength, fitness)
- Pain (grief, exhaustion, isolation, cold)
- Appreciation (inspirational, curios)
- Security (safeness, being part of something special, worthiness, togetherness, relief, empowering)

The Irish interviewees understood and defined these states as positive emotional responses linked to their lived experiences in the immediate natural environment:

*'I felt happy and a contentment of sorts. I felt warm, I felt cold, we had no electricity, we had no wifi, we had no stuff and by that I mean the stuff we collect in our lives. We didn't need any of it'* (Nick, Open Canoeist).

*'I went barefoot for part of this course. I gave myself permission to do this simple thing, to walk barefoot on the grass. I have not put my feet in a stream since I was a child. It gave me a great feeling of freedom'* (Orla, Mindfulness in Nature Course).

When prompted about finding similar emotional responses in their everyday living, most reported that time outdoors in nature is a pre-requisite for many of these states and that experiencing them outdoors often intensifies them.

*'...The tranquillity of it all, the silence, it's very rare. I know I'm saying that a lot, that you don't get, you don't get that silence, you know, there's always something in the background. That was lovely, just the calmness of the water and just being in nature'* (Claire, Guided Open Canoe Trip).

Being in the outdoors prompted positive emotional states in all of the Northern Irish respondents and some of these were described in very personal ways:

*'Appreciation for life, and thankfulness to a higher being (I'm not religious, but asked to be kept safe, and thanked afterwards). Sense of isolation. Sense of how small and insignificant the human species is, and how that the importance we put on everything in our small worlds, does not matter. To be alone with no material stresses is freeing'* (Sean, Kayaker).

Two interviewees recounted painful experiences from their trips. In the first case, the pain was physical, brought on by exhaustion and the cold, but in the second case, it took the form of emotional pain:

*'I had an emotional blip during the course. It stirred up some grief I had. So really I went through a whole range of emotions from curiosity and excitement at the start to this emotional blip and to happiness and contentment at the end. I believe our tutor is a very authentic person. She could really facilitate mindfulness because of her own journey and that helped me buy into it more. I trusted her'* (Orla, Mindfulness and Connecting to Nature course).

An English visitor to Norway considered it hard to put his finger on the country's attraction: *'quite hard to describe really – I always feel a sense of belonging as soon as I set foot on Norwegian soil'*.

## 6. Were there elements of magic or wonder in the trip?

Themes:

- Closeness to nature
- Vastness and beauty of nature and the natural world
- Folklore

- Self-awareness
- Like-minded others

Expressions of wonder and magic were deeply personal constructs for the Irish participants. Some of the respondents faltered on this question, preferring instead to talk about 'special' moments during their trips. Moments experienced through wildlife and in the natural world played a large part in their descriptions. These included experiences such as the experience of a meteor shower, witnessing a starling formation, watching red grouse in low flight over the heather, catching a fish or the magic of sitting out after dark on the river bank:

*'At night time we had a fire and roasted marshmallows under the sky. Sitting out after dark, the passing of boats in the night, a big meteor shower. It was very special. We explained to the children before hand and then we saw them in the night sky. This was very much out of the ordinary'* (Andrew, Canoe-Camping Trip).

The ethereal beauty of the Leitrim light in the sky captivated Aoife (Hill Walker):

*'There is magic in some of the atmospheric conditions we experience in the hills, like the low laying mist. We are often above it, even though we are not that high, looking down on it as it rises. It is stunning to experience this.'*

Other expressions of wonder included personal moments of self-awareness and understanding. Helen, a self-reflective wild food forager talked about how good it felt to be part of a like-minded community, how it was okay to say the word 'wow' out loud. *'I feel as if it's like I've let the little girl inside me out to do what she wants to do'* (Helen, Wild Food Forager and Nature Lover).

All Northern Irish participants talked about a sense of either wonder or magic in the natural environment, or both. Of the many examples given, the majority focused on moments of personal closeness to nature. These included for example tasting wild berries, listening to bats in the dark with bat detectors, hearing duck callers on the water, seeing the interplay of the clouds and the moon at night time. Experiencing moments like these *'opens your heart, you can let your barriers down'* (Carla, Bat and Moth Walk). Rick (Sea Kayaker) took this spiritual aspect further:

*'I feel deep appreciation to be able to witness these things. I feel filled with awe. I feel spiritual, not in the religious sense, but in an aesthetic sense. I feel peace and relaxation and I feel excitement and nervousness at times. I feel strong and fit and I feel miniscule in the universe. I feel happy out there.'*

Other elements of magic and wonder were expressed in terms of the vastness and beauty of nature. Nick gives one such description of what he felt was under him as he paddled his route. *'I had such a sense of wonder of what was under us in the water, the eels from Lough Neagh making their way to the Sargasso Sea and the run of the salmon'* (Nick, Open Canoeist).

The stories of places, the history, mythology and folklore had particular appeal for many of those interviewed. Lisa from Spain recounted the following:

*'Yes there was magic! We came across a fairy tree and some of the others tried to convince me that they have seen fairies! I loved the stories and folklore about the fairies. I am from the Pyrennes and we do not have fairies there, none that I know of anyway, so it was fun to hear*



*these stories. They make the walk more interesting. We also came across a haunted house, and again there were lots of stories!*' (Lisa, Geological & Natural History Walk).

All the respondents in Norway answered that they had magical experiences during their slow adventure trip. For those who were on the bear safari they highlighted seeing fresh bear tracks and the feeling of the bear being nearby, actually right before they arrived. For the woman on the expedition training trip, it was the celebrating of New Year's Eve and enjoying an aquavit outside, with the fireworks in the distance. For the man on the expedition training, meanwhile, it was the feeling of the snowstorm, feeling cold and sleeping outdoors in a tent, along with the views and silence. Those who were on the eagle safari highlighted the beautiful sunset, tranquility and serenity.

*'And, again, it was such a beautiful setting, and the husky adventure with Bodil. She was such a superb teacher and seeing how the dogs are trained and how she runs her business. It was exciting'* (Canada, female).

*'And to experience outdoor life to see if this is something I could do after I maybe retire from teaching, that I'd like to have a similar kind of life. So that's another source of magic, thinking of what I will do in the future'* (Canada, female).

*'But going into the wild with a tent, is what we prefer anyhow. It's not that we don't like some kind of luxury, like a nice hotel or a very nice (...), but well, with tent, and sleeping bag, rack sack or pulk or whatever, that is our way, hehe!'* (German couple).

## **7. Were there elements of fear or anxiety?**

Themes that arose included:

- Weather conditions
- Escape routes
- Experienced guide or qualified instructors
- Lack of experience or nervousness as a novice
- Exposure of the self
- Assurance of safety equipment and protective gear
- Safety on the roads
- Fear of ingesting poisonous wild food
- Concern for the environment

In Ireland, some low level anxiety was reported by those participating in watersports for the first time, but in each of the four watersports cases in this study, their anxieties evaporated within minutes of entering the water. Quality equipment, appropriate personal gear and in particular excellent instruction from guides were the reasons stated for the alleviation of their worries. This is an interesting point. The paying participants all stated that they had full faith in their guides, but none of them had done a background check on the guides' levels of qualifications or experience. Their only source of reference was what was posted on the provider's website/brochure. It is noteworthy however that in all cases investigated in this study, the providers were fully qualified with a wide breadth of experience. Nonetheless, the lack of a central safety standards scheme for outdoor providers in Ireland means that anyone can set up a company and start trading straight away. The

only statutory requirements are those related to the standard provision of the Safety, Health and Welfare Act, 2005.

Other adventurers stated that the weather could be a threat if you were not prepared for it. They stated that it is something that has to be understood and that appropriate clothing is very important. The excessive speed of approaching cars on quiet country roads was a worry for bikers and the fear of eating something poisonous was an issue for the wild food foragers. A general worry about protecting wildlife and the environment was also evident.

In Northern Ireland, conversely, most of the fears expressed were low level anxieties regarding getting caught out in inclement weather conditions or not having an escape route. Many expressed trust in their guide to keep them from danger and were conscious of their own lack of experience. Interestingly Nick expressed the fear of exposure, not only in the hypothermic sense but in a personal sense as well.

*'Our feet were numb, our legs sore and we were losing light. We were exhausted but had to keep going. We had to dig deep. There was nowhere else to go. Another thing too that was unsettling was that my friend asked me many probing questions about myself. In my job, I'm the one that usually asks the questions. It was challenging, exposing my personal stuff like this, but it was also like clearing my desk' (Nick, Open Canoeist).*

In Norway, no elements of anxiety were expressed, although the lack of response from most interviewees may have been due to a slight misunderstanding of the question. One participant did state:

*'No, there was no moment there was a certain feeling that we ever lost control. There was a very small accident, but we had full control over that so that was no problem. And we are also used to go outdoors and we had two guides, a total of five persons, so that should work out anyhow'.*

## **8. What stories do you imagine you will tell other people about this experience?**

Themes:

- Give it a go
- An escape
- Challenge
- Beauty of the landscape and wildlife
- Conservation issues
- New possibilities for the older person
- Celtic Tiger legacy
- Dangers

Each of the Irish participants interviewed had a desire to share, or had already shared their adventure experiences with family and friends, and these descriptions were almost exclusively framed in a positive light. The most usual response was to urge others to give it a go. The elements of fun, challenge and fitness were commonly associated with references to the various activities undertaken. The beauty of the landscape and a heightened awareness of conservation in wild places / wildlife also

featured. A realisation that slow adventure type activities such as open canoeing and electric biking are accessible for the older person was a take home message for some. On the negative side, the legacy of the Celtic Tiger in terms of half built apartments and closed businesses was also a story that was brought back home. A note of caution regarding the dangerous of open canoeing on the lakes was another.

Many of the Northern Irish interviewees stated that they would urge friends and family to 'give it a go'. One participant stated that the activity she engaged in was educational and should really be encouraged in the schools. Mary's response combines the idea of escapism, challenge and social aspects of participation.

*'I tell them how good it is to get away from it all, how nice it is to eat outdoors, how good a picnic tastes at the summit. And I tell them about the challenge of it all, if I can do it, anyone can! I tell them about the stories of the day, my leg getting caught in the bog, a wee fall, I always make it sound so adventurous! I also tell them about the great social side of it all. You meet people from all walks of life and I don't know but there is something about people opening up when they are out walking on the hills. We have really good conversations'* (Mary, Hill Walker).

Others stated that they tell others about the beauty of the landscape and wildlife in it. One participant stated that he is sometimes reluctant to tell others about his experiences because he feels that many people do not really grasp or understand the richness and uniqueness of the experiences. He does not feel the need to share as he feels intrinsically motivated. Another stated that he likes to share his personal journey. The stories revealed are thus diverse and unique to the individual story teller.

In Norway, the different individual experiences defined these stories. One of the women from the bear safari trip thought that it would be stories based on facts. The other one highlighted and recommended interaction with the local culture in Lierne.

The female who was on the expedition training saw the huskies as the focus for her narratives; however, this is because she has a personal interest in this:

*'People like to ask me how it was to sleep at minus 25... So I did tell stories about that... It was more my stories about the huskies! But I feel very impassioned about them. So I think that has been interesting people, so they also want to come and try husky adventures'*.

The man who was on the expedition training talked about the dogs, snow and the cold temperature. He commented that some friends do not understand this desire to experience the cold temperature; his experience of nature, the way he wants it, is a rare and exclusive interest.

The place of Flatanger and the friendly relationships with the local guide are central to the stories told from the people on the eagle photography safari. One of the respondents emphasized that you always get good experiences when you visit Flatanger. A photography guide expressed his feelings succinctly: *'I usually just let my photographs do the talking'*.

## **9. How did your experience change your perception about the country's great outdoors?**

Themes:

- Accessibility to the Outdoors
- Awareness
- Learning and enhanced knowledge
- Part of a Bigger Picture
- Awareness of increased tourism traffic.

A majority of Irish respondents stated that despite their already heightened awareness of Ireland's great outdoors, this knowledge had been enhanced through participation in courses or slow adventure type activities. Respondents gave the following examples: an appreciation of the guardians of the environment such as conservationists, improved accessibility into the great outdoors for both younger and older people and the accessibility of new activities and new possibilities (stand up paddle boarding, electric bikes and open canoes), better facilities and resources and all weather type activities.

*'I used to hate the rain. Now I love it, it is so beautiful when you are out on the board when it's raining. It makes a beautiful sound on the water. You just don't care! It is such a great way of travelling.'* (Molly, Stand Up Paddle Boarding).

More negative comments include the pressure on existing facilities if there is increased tourism traffic and problems of access in uplands and along the waterways system.

In Northern Ireland, the most common response to this question was that the participant already had a very strong sense of the richness and potential of the great outdoors. However, many stated that their awareness had been heightened through participation, particularly in terms of how to access the outdoors via the many new activities and courses that are available every year, ranging for example from Bat and Moth Walks to Stand Up Paddle Boarding. Some respondents talked about taking outdoor courses to learn more about the great outdoors, from skills acquisition and information gathering to actual knowledge about the landscape and wildlife.

Con's experiences of the great outdoors has led him to bigger questions about our place in nature and our impact on it:

*'It's almost like that sense of small and big, who's really in charge? Really we're not, we think we are the masters... we just need to realise that, you know, I suppose it's about respect, that we're part of a bigger thing and it's really, how we do that I suppose'* (Con, Walking Tour Guide).

A Swedish visitor to Norway reflected on this question:

*'I think this idea of [being] accessible for all ages, to change the idea of sport friluftsliv to... more like value-guided friluftsliv. So being out in the nature, just being able to camp and to navigate and to go more slowly rather than competing... Learning more about [how] to observe and appreciate things more... I think this was a very good exercise in learning to slow down and to travel more at a travelling pace, and observing more.'*

## Ethnographic Observation

The vignette below, written by the consultant (a researcher at the University of Limerick) illustrates both the value of ethnography in observing the behaviour of slow adventurers at play and the power of narratives in conveying the essence of experiences to potential consumers.

### The Power of Narratives: A Guided Open Canoe Trip in County Leitrim

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The river banks are lush, green and leafy. It is September 19<sup>th</sup>, yet the only hint of the tilt of the season is the yellow tinged Willow, vivid against the steel grey sky. The beginners have not noticed, not yet anyway. Their last minute adjustments are fidgety and hurried, revealing perhaps a low level anxiety as they slip down the grassy bank into the deep brown lazy flow. They bring their own colour, bright red cagoules with flashes of blue, green and orange. They immediately animate the scene.

They are afloat in open canoes, more widely referred to as 'Canadians', requiring self-propulsion by the paddler using a single bladed paddle. Marcus the guide and Josef are in the first boat. They are quickly finding their rhythm, one paddling each side, focused. Marcus in control is gently calling the shots. Anna the second guide is with Claire who is giggling infectiously, she is enjoying the floating sensation. Anna giggles too whilst manoeuvring the canoe effortlessly with her technique perfect strokes. Josef and Claire are in good hands, and they know it.

Five minutes of practice and they are ready to go. The bows are pointed downstream and off they drift amidst thwart, gunwhale and freeboard. The parlance is evocative, that of the old sea dog. The leading canoe with Claire in the bow, cuts cleanly through the glass calm surface. She is quiet, mesmerised by the motion. She is in the moment and Anna knows it. Josef and Marcus are studying the banks for kingfishers. Curious cattle watch them pass.

A cup of coffee in the middle of the river never tasted so good. The canoes are rafted together and the conversation is easy and convivial. Everyone wants to be here. Josef says it's like owning the moment.

Claire is now paddling with Josef and they are managing very well. There is much chatter and laughter as they gain control, even a swear word when they gently bump off a submerged rock. Afterwards at the canal lock Claire and I talk about the trip. 'It was sooo good' she enthuses, 'so special, but I just can't believe he didn't propose!'

To complete the profile of the adventurers that participated in the study it is important to comment on the more human element of the data gathered. The inflection of voice, tone and timbre helps capture the energy of the speaker and reveals so much more about their experiences than just the spoken or printed word. Laughter, facial expressions, gestures, pauses, hesitations and particular stress on particular words reveal much about a person's meaning and motivations. Without exception, each of the respondents in this study spoke with passion, energy and enthusiasm about the slow adventure activities that they had experienced. There was an eagerness and a willingness amongst them to re-live their experiences and to tell their stories.

## 6. Discussion and Conclusions

The aim of this data gathering exercise was to conduct targeted, applied and relevant research, at the start of the project, to inform and influence the shape of the other work packages. As the overall

project aims to develop greater market reach for SMEs operating in the slow adventure sector, it was important that partners, and the SMEs in their region, are able to develop a better understanding of which consumers to target and how to market to them. This discussion regarding the implications of this research exercise is divided into three parts:

- An understanding of key consumer trends, within and outside the tourism sector
- What elements of slow adventure enthrall consumers and what they seek from such experiences
- What are the markets for these consumers and how to market to them

### *Consumer Trends*

While it naturally creates generalisations, as well as trying to predict future behaviours, needs and motivations, it is considered that slow adventure customers are likely to share many or all of the following traits, reflective of current consumer trends:

- Being open-minded and well-educated.
- Having above-average income, and wanting 'quality and value', not cheap.
- Decisions increasingly likely to be made by females.
- A need for elements of privacy: as an antidote to sharing actions and photos through smartphones.
- ... but with a desire to acquire and, crucially, share social capital.
- Aspiring nomads who seek greater elements of simplicity in increasingly complicated lives.
- A willingness to pursue more ethical travel that directly supports local businesses.
- Travelling with 'empathy' – with respect, responsibility, compassion and understanding for others.
- A desire to 'get lost' and find themselves.
- A move towards a collaborative ethic: more about 'access' than 'ownership'.
- Yearning for a sense of mastery – learning to be competent outdoorsfolk

### *The Slow Adventurer themes*

#### *Silence please – quiet, space and time*

- A feeling of escapism is a highly important motive for the slow adventurer and when it is achieved in nature, it prompts a strong sense of de-stressing in the individual. A passing motor boat would be an annoying noise in a quiet natural setting.
- The slow adventurer believes in the importance of making time to spend in nature and this time is most often activity driven. Nature is already a significant element in the slow adventurer's life and in many cases, is in contrast to the tasks of their working lives. The opportunity to spend even further time in nature is desirable. Seeking a work – life balance is important and nature is viewed as a re-energiser.
- Linked to this, slow adventure opens up opportunities for 'switching off the clock'. Mid-way through the crossing on a sea kayaking trip a whale broke the surface some distance in front of the group. It brought them into a new way of being here – they were now operating on 'whale time': the group was now guided by the whale.

### *Give us a hygge – communitas and belonging*

- Self-time in nature and shared time with friends in nature are important motives. Slow adventurers enjoy being out in nature's elements, and enjoy the associated exercise and fitness demands. A sense of connectedness and heritage is important, particularly in terms of place.
- The slow adventurer has regular experiences of nature's power and beauty. They have a willingness to share such experiences with others, and these help strengthen bonds.
- A sense of fun and freedom in the outdoors is important.
- Positive emotions such as joy, peacefulness and thankfulness are expressed in terms of the natural beauty of the landscape, and these emotions are intensified when experienced through adventure and activities in the outdoors. Mental and bodily strength are important components for the slow adventurer and pain in the form of exhaustion or cold for example, may also be experienced at times.

### *Extemporisation, uncertainty and quality assurance*

- Slow adventure clients, and consumer trends in general, point to a desire for bespoke experiences which can change according to opportunity and situation
- Particular concerns for the slow adventurer include weather conditions, escape routes, lack of experience and in a more reflective way, self- exposure.

### *Getting involved – living and learning the wilderness dream*

- They are internally motivated and open to experiences that are unique, educational and nature focused.
- Activity in the outdoors is driven by the slow adventurer's love of nature and their willingness to learn new skills and knowledge.
- The slow adventurer finds wonder in the vastness of nature, one's proximity to nature and the folklore that enriches the natural environment. They talk about little details in nature, and enjoy eating or trying foraged or wild food.

### *Sharing the magic of wild places*

- Importantly, slow adventurer target groups are very likely to urge others such as family and friends to give it a go. Grasping a challenge or just escaping into the beauty of the landscape is actively encouraged.
- This is further supported by the enthusiastic embrace of social media platforms. This, if supported by entrepreneurs, is credible, free and effective marketing.

### *Key Markets*

Naturally, it is rather difficult to generalise about core markets for seven different and quite geographically disparate markets. Key consumers for Lapland-based experiences are bound to differ to some extent to those for Northern Ireland for example. From the earlier discussion it appears that some of the better-established consumer groups will remain the key markets for slow adventure SMEs

for the foreseeable future. While the Chinese and Indian markets retain huge potential, on account of both their obvious size and burgeoning middle classes, the typical Indian or Chinese customer does not readily fit the slow adventure profile. Much the same can be said about the Russian market, with the obvious notable exception of neighbouring Finland.

In contrast, it is considered that, in general terms, some of the more mature markets still offer the greatest scope and potential as target consumers of slow adventure experiences. American, Canadian and Australian visitors, as a group, are relatively wealthy, are enticed by European landscapes, food, culture and history, and have large population segments with a strong outdoor ethos. Although the findings of the e-mail panels are not strictly generalizable as such, they would appear to corroborate this, with widespread support, desire and enthusiasm for many elements of slow adventure experiences for the educated, urbane populations of Sydney and New York. These consumers also have a lot of familial ties to a number of the partner countries, Ireland, Northern Ireland and Scotland in particular. Much the same could be written of New Zealand, although it naturally has a very small population.

Closer to home, the Dutch and Germans are seasoned travellers to northern Europe and are also strongly outdoor-oriented as a group. The Germans in particular tend to be high-spending consumers, although that comes with high expectations, which destinations need to meet. Again, the email panels would appear to support the significance of Amsterdam and, in particular, Berlin as an appropriate target market. It is considered that French and Italian visitors are less obvious potential consumers, although interest will still exist in pockets, the former less likely to travel outside of their home country and Italians more likely to tour around and take in multiple destinations.

The enduring importance of domestic markets is often overstated. Great tourism experience products emanate from experiences – often the experience of the new, the extraordinary, the different. In this sense, slow adventure entrepreneurs have a far easier sell to non-local and non-domestic markets, where clients are unfamiliar with the terrain, weather and life in the wilder parts. In Scotland, for example, a national study has suggested that only 14% of visitors are from outside the UK. Big domestic urban populations are all considerable potential markets for slow adventure experiences, but in effect, this highlights the massive opportunity for international (and domestic urban centred) populations to be targeted to great effect. Thus, Oslo residents may be marginal clients for slow adventure products in Norway, but very good targets for experiences in Scotland.

### *Targeting Key Consumer Markets*

Europe is seen as a destination where travellers can forge deeper connections to the people and traditions of the places they visit. Research suggests that to capitalise on these perceptions, slow adventure should be promoted with the following in mind:

#### *Guides*

- The expertise of guides is an extremely high value component of a guided trip. High levels of emotional awareness is required in the guides, as well as detailed knowledge of the landscape, environment and history, contribute much to the customers' amazing experiences.
- Guides need to allow participants time and opportunity to reflect in the landscape and in nature. This is inferred in key respondent quotes: 'wow' moments occurred when this reflection time was allowed.
- As an extension of that, slow adventure and 'hygge' ('creating a warm atmosphere and enjoying the good things in life with good people' (VisitDenmark')) are complementary in so many ways.



### *21<sup>st</sup> Century – demanding client groups*

- ‘Value’ is an increasingly important notion: not ‘cheap’, but good value for money.
- Consumers are becoming more ‘professional’, with increasingly high expectations and becoming more discerning or demanding. This is especially true in terms of ease of access to information, the level of information demanding and the ability to book easily and quickly.
- On the subject of ‘time’, many consumers want to optimise their time on holiday and make the most of their precious resource.
- It may be worthwhile looking at ‘vertical integration’, forming partnerships with accommodation providers for example, in order to help to improve the quality of the total ‘servicescape’.
- Find ways to augment the product, such as with health and wellness or skill-learning elements to add value.

### *Cultural considerations*

- Wilderness travel may not be at the front of people’s minds if they are from BRIC countries; wilderness is ‘socially constructed’ and ways that marketing should be modified to suit BRIC markets should be investigated.

### *Share the love - communications*

- Opportunities should be maximised for facilitating ‘post-experience communal effervescence’ – sharing the excitement and stories of the day around a bar in the evenings. Such stories, augmented by photos, are likely to find their way onto social media sites.
- A move away from ‘what we did’ or ‘what we saw’ to ‘who we met’, making more emotional connections to destinations.
- A shift away from ‘what there is to do’ as an advertising message, to ‘how it makes me feel’.
- A recognition that taking people out of their comfort zone offers great scope for exciting experiences and cherished memories
- The importance of trying somewhere, or something, new – with great potential for social capital, which is also more likely to provide good social media material.
- Make more imaginative use of stories to sell products, using myths and legends to draw in visitors.

### *The importance of place*

- Have genuine and true products, tailored towards customer needs helps to meet expectations of ‘Scottishness’, ‘Norwegianness’ etc. Consumers are looking for uniqueness and these products can be offered that they cannot experience so easily at home.
- The linking of the food and drink consumed back to the landscape or seascape through which customers have just travelled.
- The promotion of ‘authentic’, rewarding and high-quality experiences in beautiful landscapes and with a strong cultural element.
- Developing a suitable brand or theme that portrays the essence of slow adventure and inspires appropriate ‘wanderlust’. In Finland, for example, tourism themes have been developed on the basis of Visit Finland’s core values. ‘Silence, please’ presents Finland as a counterpart to the hectic, ever-accelerating rhythm of daily life. ‘Wild & Free’, meanwhile,

highlights the opportunities that the Finnish nature offers for spectacular nature activities such as dog-sled safaris, canoeing in the archipelago, or even a snowball fight in the city.

- And do not ignore bad, or cooler weather – embrace it as spectacular. It is a point of difference, of geography and of place, and it has inscribed the cultures in which we operate.

## Appendices