Work package 4

Final report:

Development and piloting of new marketing and clustering models

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Report compiled by

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Contents

1. Introduction

Work package four (WP4) is titled, *Development and Piloting of New Marketing and Clustering Models*. This was the largest work package of the SAINT project and comprised approximately 40% of the total project budget. ETOUR served as the work package leader, and the work package required contributions from all of the project partners. The activities in this work package were directly informed by the findings of WP3.

As the core work package of the SAINT effort, WP4 aimed to help SMEs in the tourism sector through development of i) new marketing approaches and ii) more effective business generation through clustering or 'co-operative working'.

Specifically, this work package developed and tested new marketing and clustering models to:

- Regionally cluster slow adventure SMEs together and develop common values.
- Target high-value customers, and enable longer operating seasons.
- Trans-nationally cluster slow adventure SMEs together, harnessing the shared characteristics of the places and environments in which they operate, with appropriate joint branding measures.[1]

ETOUR delivered WP4 through two main project activities: (i) a survey of slow adventure service providers in each partner country, (ii) case studies in each partner country that were designed to explore new marketing and/or clustering approaches along with other key elements of the slow adventure experience. The survey serves as the empirical basis for the case studies, and together, the survey results and case studies offer a rich description of slow adventure activities from the perspective of SMEs in each partner region.

The next sections describe the survey and case studies in general terms. Results from the survey and the case studies are then presented. This report concludes with a synthesis of the survey and case study findings, and a discussion of the implications for the future of the Slow Adventure brand and business effort.

1.1. Survey

To understand the marketing and clustering dynamics in each partner area, ETOUR prepared a baseline survey based on the prior studies of the nature-based tourism supply in Scandinavian context (Fredman and Margaryan, 2014; Stensland et al., 2014). The survey was administered over the internet and translated into the relevant languages for each partner area (English, Icelandic, Swedish, and Norwegian).[2] The survey was designed to understand how SMEs in each partner area operationalize the slow adventure concept, market and promote their slow adventure offerings, and form SME clusters in order to deliver holistic slow adventure experiences that individual SMEs could not deliver on their own.

[1] See Appendix 1 for a complete description of work package 4 as submitted in the SAINT project application to the EU Northern Periphery and Arctic Programme.

[2] See Appendix 2 for the English language version of the survey.

The survey design employed purposeful sampling techniques. Purposeful sampling is a common methodological approach for exploring the relationships between different entities (i.e., individuals, businesses, or organizations) and has been widely used in studies of networks and clusters (e.g., Anderson & Jack, 2002; Laven, Krymkowski, Ventriss, Manning, & Mitchell, 2010; Mbonyane & Ladzani, 2011)

1.2. Case Studies

Each partner area was invited to develop a case study to test how their specific region might advance and/or implement Slow Adventure as a business development opportunity. These case studies were based on tourism clustering and marketing concepts.

Tourism clusters can be defined as spatially concentrated groups of service providers and supporting institutions (e.g., public agencies, DMOs, NGOs, and local communities) focused on the delivery of tourism products (i.e., experiences). It is widely acknowledged that such clustering can enhance innovation, knowledge spill-overs and learning, lower transaction costs (e.g., by joint marketing activities), and increase competitiveness, all of which significantly contribute to regional development. The two key characteristics of tourism clusters are the (1) location-specific configurations of services and supporting institutions and (2) strong functional relations among them. Previous research suggests that micro-clustering may be the most relevant approach for service providers (e.g., SMEs) targeted in the SAINT project. Micro-clusters tend to be associated with constellations of complementary firms that collectively deliver specialized regional products (i.e., the single experience that tourists seek) (Michael, 2003; Huijbens et al., 2014). Research also suggests that such micro-clustering can be especially beneficial for small communities in remote or peripheral areas.

The case studies focused on the three cluster models that were specifically identified in the SAINT project application. These three cluster models are:

- *Holistic clusters* that are comprised of operators, transport and accommodation providers. This type of cluster is known as a vertical value chain and includes, for example, providers involved in the delivery of packaged tourism products at a specific destination (e.g., transportation, accommodation, activities and attractions, tour guides etc.).

- *Community clusters* that emphasize the involvement and role of public agencies, DMOs, local residents etc.

- *SMEs clustered by 'target market'* that represent a constellation of co-located service providers identified by the needs of specific tourist segments, which are actively collaborating with the purpose of facilitating the tourist experience (e.g., slow adventure).

In addition, SANIT partners were offered three additional case study approaches that focus on different means of marketing to potential consumers.

The complete menu of case study options that were offered to the SAINT partnership as part of WP4 are summarized in Table 1.

The description of the case studies presented below are drawn from multiple data sources including (i) information collected in each partner area by SAINT partners, (ii) biannual reports submitted by SAINT partners to the EU-NPA Programme via the eMS reporting system, and (iii) multiple interviews and work sessions conducted by ETOUR with each SAINT partner area.

The following sections present the survey findings along with the outputs and results from each case study. These are presented on a country-by-country basis in alphabetical order (Finland, Iceland, Ireland, Northern Ireland, Norway, Scotland, and Sweden).

Table 1. Menu of Slow Adventure Case Study Options.

Case study	Clustering/Marketing Approach	Description
1	Holistic clusters	This case study addresses the question: • How can, and do, local service providers (SMEs and micro-businesses) collaborate to develop the slow adventure?
2	Community clusters	This case study addresses the questions: • How can public entities (e.g., DMOs) help local SMEs in promoting unique local slow adventure products to new markets, particularly in remote areas)? • How can DMOs facilitate local community involvement in slow adventure product development?
3	Clustering by target market	This case study addresses the question: • Which service providers should be involved in the delivery of slow adventure experiences that is designed for a specific customer segment(s)? For example, in the case study area, which service providers should be involved in the delivery of a slow adventure experience that is designed for families with small children/nature photographers/spirituality seekers, etc.?
4	Traditional marketing approaches	This case study addresses the question: • How can traditional marketing approaches be used to communicate the marketing message that promotes the slow adventure experience?
5	Marketing that is facilitated by mobile technologies	This case study addresses the question: • How can mobile technologies facilitate the slow adventure experience?
6	Marketing that utilises social media	This case study addresses the question: • How can social media be utilized to reach new markets for slow adventure tourism products, as well as to encourage repeat visitation and positive word-of-mouth?

2. Findings and Results

2.1. Finland

The primary goal of the SAINT-Finland case study was to have local SMEs working together in planning, costing, marketing and selling slow adventure packages. In this case study, the SAINT-Finland team prepared slow adventure packages for the summer season under three different themes. The SAINT-Finland team also tested three different ways to develop full-service products. Finally, The SAINT-Finland team sought to compare what development model worked the best and what did not.

This case study also focused on connecting the customer more closely to the product development process. The SAINT-Finland team made use of the slow adventure guidelines (as discussed in transnational meeting in Finland) in the product development to understand how these guidelines and the slow adventure philosophy was incorporated into the packages and tour itineraries.

The three slow adventure service concepts that were developed are:

1. Regional cycling tours.
2. Land of national parks tour.
3. Natural wellbeing tours.

It is important to note the following:

- All of the slow adventure products developed in this case study are summer products.
- The case study encouraged approximately 10 SMEs (between 6-12) to work together to develop itineraries around each of the service concepts.
- The three service concepts were developed from an initial brainstorming event facilitated by the SANIT-Finland team on 23 February 2016.

Survey Results

The SMEs in the SAINT-Finland cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 2.1.1, guiding services, food and beverages, organization of tours and accommodation are the business services that respondents rank as most relevant (or important). Moreover, food and beverages, as well as organization of tours are more relevant for SAINT-Finland SMEs compared to SMEs in the other parts of the SAINT project's transnational cluster.

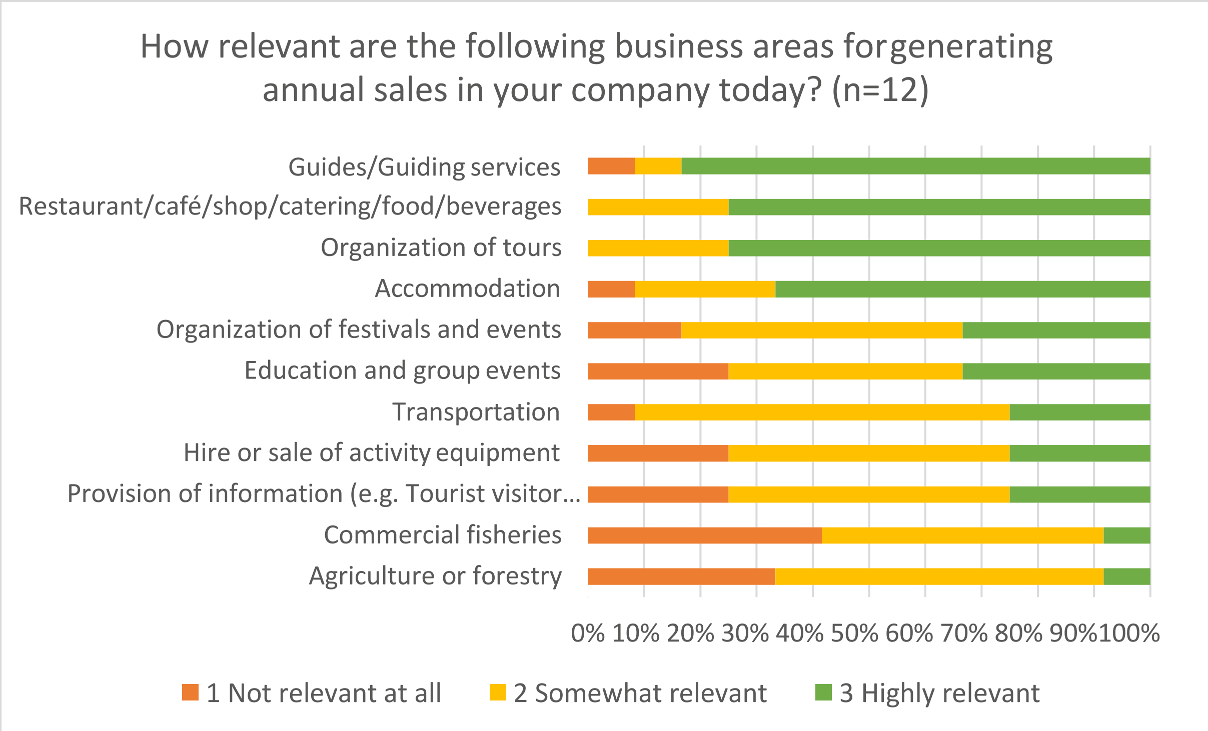


Figure 2.1.1. Relevant business areas

Table 2.1.1 provides information on the number of employees in the SMEs within the SAINT-Finland adventure cluster. Only 17% of SMEs have no full-time employees, 50% employ 1-10 full time employees, and 33% of SMEs report the company employed at least 11 full time employees. In total, 67% of SMEs indicate that they have one to three employees engaged in nature-based tourism (NBT) activities. Additionally, 67% of SMEs employ seasonal full time employees and 75% employ seasonal part time employees, while the proportion SMEs with full time and part time employees engaged in NBT activities constitutes 42% and 50% respectively.

Table 2.1.1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	14%	7%	43%	7%	21%	7%	0%	100%
Year round part time employees	67%	17%	8%	0%	0%	8%	0%	100%
Seasonal full time employees	36%	0%	21%	7%	14%	14%	7%	100%
Seasonal part time employees	38%	15%	31%	15%	0%	0%	0%	100%
Number of employees engaged in NBT actitivities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	36%	14%	43%	0%	7%	0%	0%	**100%**
Year round part time employees	85%	0%	8%	0%	0%	8%	0%	**100%**
Seasonal full time employees	64%	0%	21%	7%	7%	0%	0%	**100%**
Seasonal part time employees	69%	15%	8%	8%	0%	0%	0%	**100%**

The SAINT-Finland cluster offers activities all year-around (Figure 2.1.2), as all of the months of the year are highly or somewhat relevant for generating annual sales to a substantial proportion of the SMEs in the cluster. The peak seasons are is from December to March, and from July to September. December, January, February and March have a significantly higher relevance to SAINT-Finland SMEs compared to SMEs from other countries in the transnational cluster, while May, June, August and October have a significantly lower relevance. May, October and November are not relevant at all for a substantial proportion of SMEs in the SAINT-Finland cluster.

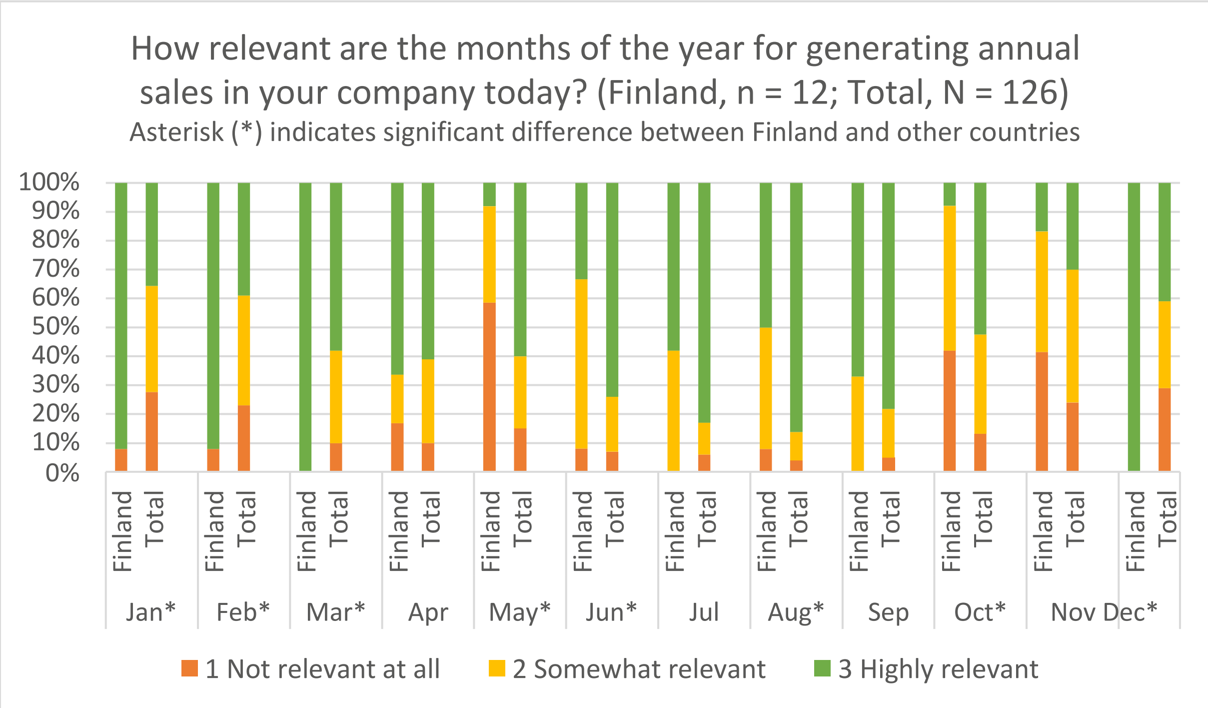
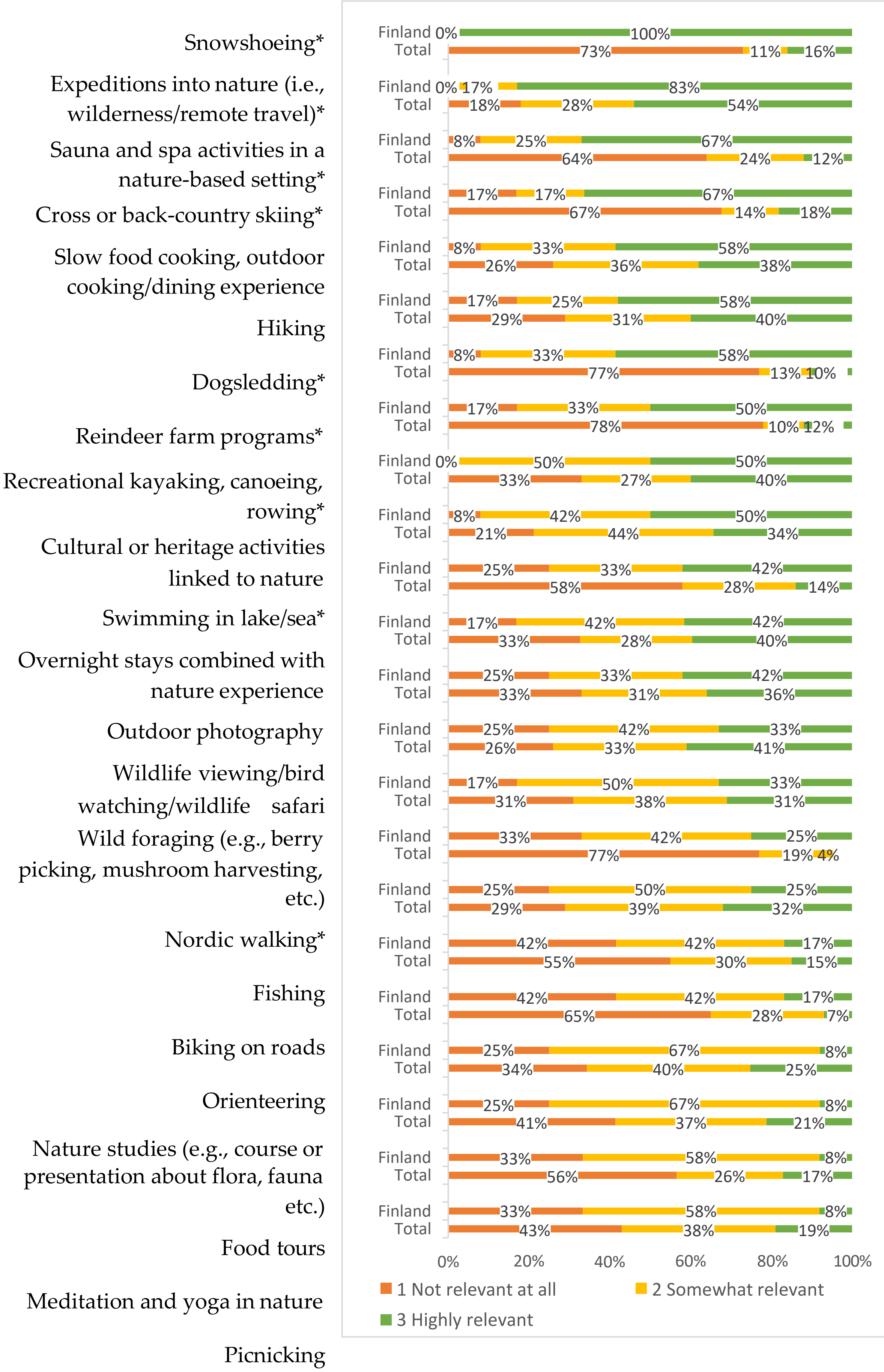


Figure 2.1.2. Seasonality

Figure 2.1.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs that represent the SAINT-Finland cluster and/or the transnational slow adventure cluster as a whole. Snowshoeing, expeditions into nature, sauna and spa activities in a nature-based setting, cross or back-country skiing, dogsledding, reindeer farm programs, recreational kayaking, canoeing, rowing, swimming in lake/sea and Nordic walking are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Finland cluster compared to SMEs in other countries.


Snowshoeing*
Expeditions into nature (i.e., wilderness/remote travel)*
Sauna and spa activities in a nature-based setting*
Cross or back-country skiing*
Slow food cooking, outdoor cooking/dining experience
Hiking
Dogsledding*
Reindeer farm programs*
Recreational kayaking, canoeing, rowing*
Cultural or heritage activities linked to nature
Swimming in lake/sea*
Overnight stays combined with nature experience
Outdoor photography
Wildlife viewing/bird watching/wildlife safari
Wild foraging (e.g., berry picking, mushroom harvesting, etc.)
Nordic walking*
Fishing
Biking on roads
Orienteering
Nature studies (e.g., course or presentation about flora, fauna etc.)
Food tours
Meditation and yoga in nature
Picnicking
Finland 0% 100%
Total 73% 11% 16%
Finland 0% 17% 83%
Total 18% 28% 54%
Finland 8% 25% 67%
Total 64% 24% 12%
Finland 17% 17% 67%
Total 67% 14% 18%
Finland 8% 33% 58%
Total 26% 36% 38%
Finland 17% 25% 58%
Total 29% 31% 40%
Finland 8% 33% 58%
Total 77% 13% 10%
Finland 17% 33% 50%
Total 78% 10% 12%
Finland 0% 50% 50%
Total 33% 27% 40%
Finland 8% 42% 50%
Total 21% 44% 34%
Finland 25% 33% 42%
Total 58% 28% 14%
Finland 17% 42% 42%
Total 33% 28% 40%
Finland 25% 33% 42%
Total 33% 31% 36%
Finland 25% 42% 33%
Total 26% 33% 41%
Finland 17% 50% 33%
Total 31% 38% 31%
Finland 33% 42% 25%
Total 77% 19% 4%
Finland 25% 50% 25%
Total 29% 39% 32%
Finland 42% 42% 17%
Total 55% 30% 15%
Finland 42% 42% 17%
Total 65% 28% 7%
Finland 25% 67% 8%
Total 34% 40% 25%
Finland 25% 67% 8%
Total 41% 37% 21%
Finland 33% 58% 8%
Total 56% 26% 17%
Finland 33% 58% 8%
Total 43% 38% 19%
0% 20% 40% 60% 80% 100%
1 Not relevant at all
2 Somewhat relevant
3 Highly relevant

** - more relevant to slow adventure cluster in Finland in comparison to other countries*

Figure 2.1.3. Relevance of various slow adventure activities for generating annual sales (n=12)

Figure 2.1.4 illustrates the extent to which various elements of the slow adventure experience are included in the nature-based tourism products currently offered by SMEs in the SAINT-Finland cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 80% of SAINT-Finland SMEs already include 11 out of 13 slow adventure elements, either to some extent or to a high extent, in the nature-based tourism products that they offer. Moreover, all SMEs reported that they already include human-powered slow journeys, local, wild or slow food, storytelling and outdoor living. SAINT-Finland SMEs include many elements to a significantly higher extent compared with SMEs in other countries, including human-powered slow journeys, nature-powered slow journeys, practical outdoor skills, physical wellness (e.g., spa, sauna, massages etc.), local, wild or slow food, storytelling and outdoor living.

When asked about their willingness to include all elements of slow adventure into new nature-based tourism products, SAINT-Finland SMEs responded that they are interested in doing so to a higher extent than what they offer today. While 42% of SMEs include herbal medicine in the NBT products that they currently offer, 100% of SMEs reported that they are interested in including this element into new NBT products that they might offer in the future. This is the largest increase in any of the 13 elements.

Out 12 SMEs in the SAINT-Finland cluster, 10 reported that they offer some form of accommodation to their guests:

- Hotel (7 SMEs).
- Rental of cottages / self-catering (7 SMEs).
- Wild camping (6 SMEs).
- Cottage camping (4 SMEs).
- Rental of apartments / self-catering (3 SMEs).
- Tent camping on the campsite grounds (2 SMEs).
- Bed & Breakfast home stay (1 SMEs).
- Guest house (11 SMEs).
- Caravan camping (1 SMEs).
- Bunk house accommodation (1 SMEs).
- Glamping (1 SMEs).

- Farm stay (1 SMEs).

Eight SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various organizations, including the national and local tourism bodies, local co-operative groups, and other third party organizations. In addition, four companies reported that 75% of the ingredients used in their menu were produced locally, and three more companies indicated that 50% of the ingredients used in their menu were produced locally.

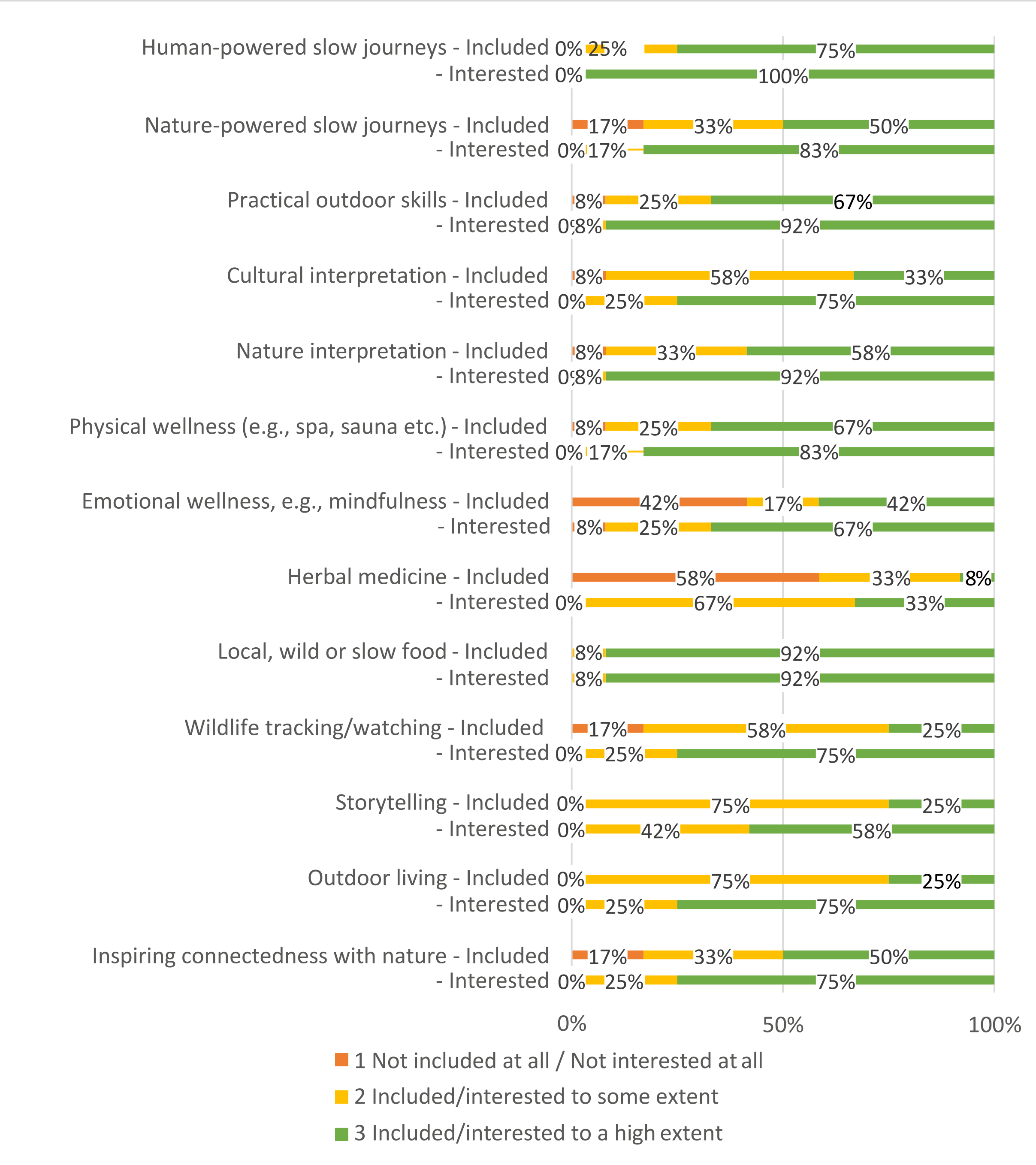


Figure 2.1.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you

interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=12)

The survey also included open-ended question about opportunities and threats of the introduction of a new "slow adventure" brand to market nature-based activities in Finland. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *Promote international cooperation:*
    - " Everything international is good. Together we are stronger."
- *Promotion of the local area, increase the exposure of peripherally located micro-sized enterprises especially to new international markets:*
    - "Great opportunities, because we have excellent nature here as background. Also many of our customers are interested about slow adventure or activities, e.g. older people and also many foreign tourists."
    - "Untouched wilderness".
    - Encouraging people who are not accustomed to nature activities to take part. "Introducing a small step approach to go outdoors."
- *"Slow adventure" as a ready to use product concept.*
    - "We think there are good opportunities to connect people to nature by slow adventure products. It combines the peacefulness that nature is offering us both mentally and physically and then it brings us to the unknown, so we find slow adventure very appealing."
    - "To get a concept makes lives much easier than trying to find own profile or way of doing."

Threats

Study participants also identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Crowding and carrying capacity*, environmental issues as the possible negative outcome of increasing tourist flows and, consequently, increasing the pressure on fragile and remote areas:
    - "Mass tourism is not sustainable, windmill farms and mining."
    - "One thing that we thought of was that if some find it to be a threat and get afraid to get a big invasion of nature lunatics running around in the peaceful wilderness."
- *Misperception of the "slow adventure" concept by customers and service providers:*

- “Slow might be too slow for someone. The quality has to be equal and on high level. The message to the target group has to be the same.”

- *Market capacity, possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands*:

    - “How to reach and get those groups who are interested about slow adventure and nature especially in summer time. Winter is easier because of snow, northern lights etc. How to make summer enough interesting, especially for foreign people. Finnish people also can do hiking, fishing etc. by them self and they are not so willing to pay those kind of things. Therefore, you have to build programs that way. Foreign people need more guiding.”

    - “Price war.”

    - “No more any new brand. We already have very good Wild food Kuusamo-Lapland brand and Saunatour brand.”

Case Study Results and Findings

The SAINT-Finland team conducted the following activities in support of their case study:

- Completion of a study (market research) of business opportunities in national parks in order to support slow adventure itinerary development. This study was completed during the spring and summer of 2016, and involved three stages. Stage one involved a literature and publication review that focused on existing business models in national parks worldwide. Stage two involved qualitative interviews with tourism service and activity providers as well as a questionnaire, which was distributed to local residents, entrepreneurs, researchers, and other key stakeholders in the area. Stage three involved the collection of supplemental data and the subsequent analysis of the data and the communication of study findings.

  Findings from this market research study include:

    - Most entrepreneurs feels that national parks are good environments for nature tourisms activities, services and products.

    - Some of the entrepreneurs feel that the many rules and laws that govern national parks are difficult to understand and that such regulation limits business development and opportunities.

    - Entrepreneurs, local residents, and researchers see a number of opportunities for different business models associated with national park and slow adventure context.

- The SAINT-Finland team undertook a number of specific activities to promote development of the slow adventure effort. Like in many other contexts, one of the primary challenges is to encourage SMEs to view each other as potential partners, rather than as competitors. This is no simple task in the highly competitive arena of tourism. To encourage this shift in thinking and develop an effective cluster, the SAINT-Finland team undertook the following actions:

- Site visit to Hossa (17 August 2016): This site visit served many purposes, including (i) dissemination of the results of the market research study, (ii) benchmarking exercise of Hossa national park, (iii) promotion of cooperation between SMEs of different destinations within the SAINT-Finland region, and (iv) development of slow adventure itineraries.

- Site visit to Syöte (22 September 2016): This site visit mirrored the visit to Hossa, in which results from the market research study were disseminated, SMEs were encourage to collaborate and initiate cluster activity (i.e., slow adventure product development).

- Site visit to Carelia (5 July 2016): The primary focus was to investigate how cycling holidays in the area were organized. In addition, the purpose of this visit was to learn from existing summer paddling events and activities with an eye towards integrating these offers into the SAINT-Finland slow adventure itinerary and product development.

- SAINT-Finland hosted a product development event for partner SMEs. The purpose of the event was to create a new slow adventure product for Chinese customers in each of the four national parks in the SAINT-Finland project area. This event also included dissemination of the latest advances in digitalization, namely the use of pictures and live streaming in social media and mobile marketing.

The SAINT-Finland team also conducted a series of marketing activities in order to support the development of their slow adventure cluster. These marketing activities included:

- Publication of the best nature photography locations through the Land of National Parks project, which is one the area's premiere nature-based tourism promotional efforts.

- Establishment of SAINT landing page in association with the "Land of National Parks" website (http://www.nationalparks.fi/landofNP).

- Collaboration with the slow adventure bloggers from Let´s Go Slow. The blogging effort focused on four national parks, which are the core of our slow adventure offers and our summer tourism industry. The efforts also incorporated SMEs from all of four of the SAINT-Finland project area regions.

Through these clustering and marketing activities, the SAINT-Finland team coordinated the development of several slow adventure packages:

- Three initial packages were developed around the "Slow Down in the Land of National Parks" concept:

  - *Slow adventure cycling holiday from National Park to National Park*: This package involves the four national parks that comprise the "Land of National Parks" promotional effort: Oulanka, Riisitunturi, Syöte and Hossa.

  - *Nature Photography in the Land of National Parks*: This package includes information about the best places, times, and locations for nature photography.

- *Natural Nature Wellbeing in the Land of National Parks*: This package focuses on the Finnish sauna and folk healing tradition along with the healing power of nature.

- Hiking & Yoga on Riisitunturi and sauna yoga.

- Slow adventure canoe/kayak hiking on Lake Kuusamo on a self-catering basis.

- Slow adventure fly and drive itinerary proposal including slow adventure activities and visiting 4 national parks. The itinerary includes the car touring routes developed for the Outdoors Finland project. Outdoors Finland intends to market these routes for tour operators throughout Europe.

- The development of the cycling, canoeing and car touring routes was supported by using various ICT-based applications and resources, including as follows:
    - QGIS, a free open source geographic information system software.
    - Garmin Base Camp with MTK Suomi-map.
    - For the road route designs: http://www.gpsies.com/
    - National Land Survey of Finland:
        - https://tiedostopalvelu.maanmittauslaitos.fi/tp/kartta?lang=en
        - https://asiointi.maanmittauslaitos.fi/karttapaikka/?lang=en
    - Finnish open spatial data: http://www.paikkatietoikkuna.fi/web/en
    - Trello, routes, itineraries etc. are listed on Trello.
    - Strava Heatmap.

- The SAINT-Finland team also organized a number of meetings and workshops that allowed guests as well as tour operators to test and evaluate selected slow adventure packages. Feedback from these meetings will help inform product development for the European as well as Chinese markets:
    - During the summer of 2017, European experts tested slow adventure products and the area in general, under the theme, Slow Adventure in the Land of National Parks. The feedback from visitors was very positive. National parks are highly appreciated destinations these days, and the fact that SAINT-Finland can offer several parks, under the umbrella of the Land of National Parks, was very appealing to the experts. The experts confirmed that the slow adventure theme has great value for marketing and sales, as it perfectly describes the purity and cleanliness of the SAINT-Finland region.
    - The team of European experts included a representative from a Dutch company that has now set up a local company in the SAINT-Finland area. The company has recently bought a property (a former school in a remote village) by Lake Kitka, which is near

two national parks. The newly established company with Dutch capital is now in the process of developing their own slow adventure center in Kuusamo. The company co-operates with local SMEs to develop slow adventure packages and plans to bring their already existing Dutch clientele to the SAINT-Finland area for slow adventuring. The company sees significant potential for offering slow adventure products all year round. This case is a successful example of foreign investments into the slow adventure tourism sector that were attracted because of SAINT project activities.

- An expert from China participated in the service design seminar, which was organized in Spring 2016. This expert spoke to SMEs in the SAINT-Finland area about the specifics of the Chinese market. At the workshop in the Autumn 2017, the SMEs worked in small groups to sketch the slow adventure itinerary for each of the region´s 4 national parks:

    - Hossa – Excursion to Muikkupuro lean-to-shelter.
    - Hossa – Boat trip on the Julma Ölkky canyon lake.
    - Riisitunturi – Silence please.
    - Iso-Syöte – Photography tour of fell top and swamp: the diversity of the local nature.
    - Oulanka – Nature of Kuusamo.

Highlight 1: Photography in Nature as Slow Adventure

The SAINT-Finland cluster is promoting wild and/or nature photography as part of its slow adventure offer, and the cluster seeks to become the leading European destination for wild and/or nature photography. An important part of this effort was the mapping of all of the best nature photography locations in the "Land of the National Parks". The locations were inventoried by Paavo Hamunen, who is a well-known photographer in Finland with over 20 years of professional experience (Figure 2.1.5). The locations were then made available on Google Maps and included English-language descriptions associated with each location (Figure 2.1.6). Wild and/or nature photography embodies many of the key elements of the slow adventure concept. It requires immersion in the natural surroundings, and the photography itself can be a way to experience nature in its own time and rhythms.

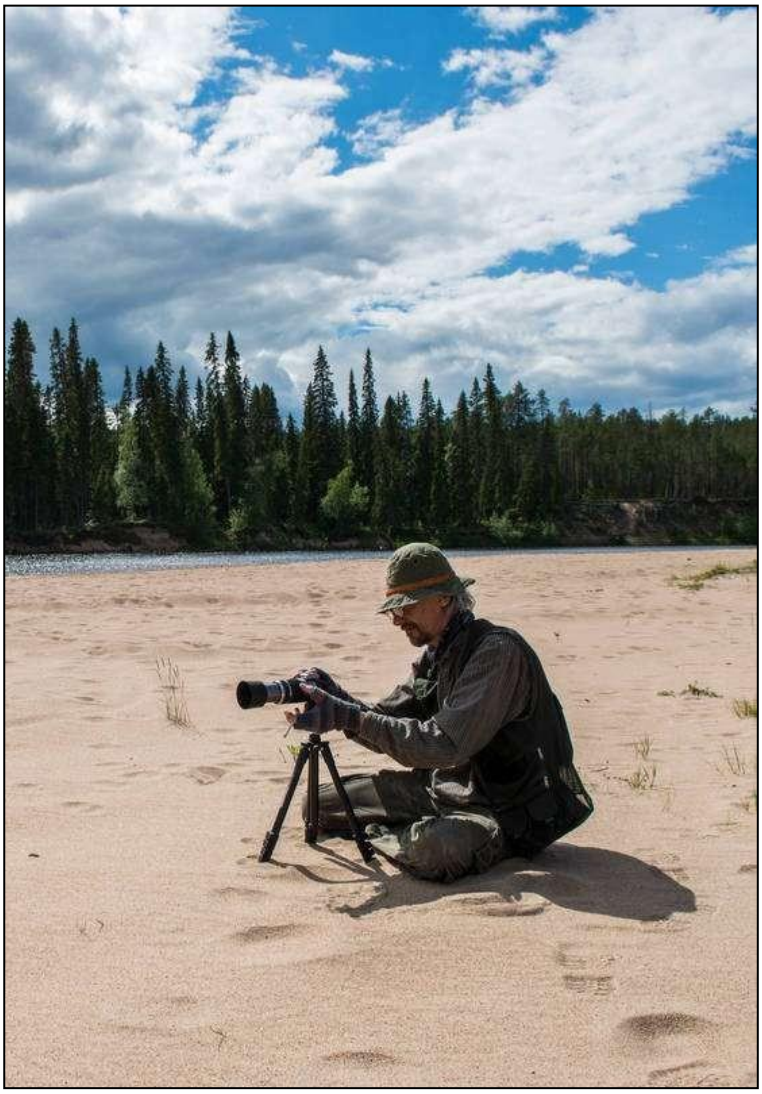


Figure 2.1.5. Nature photography in action.

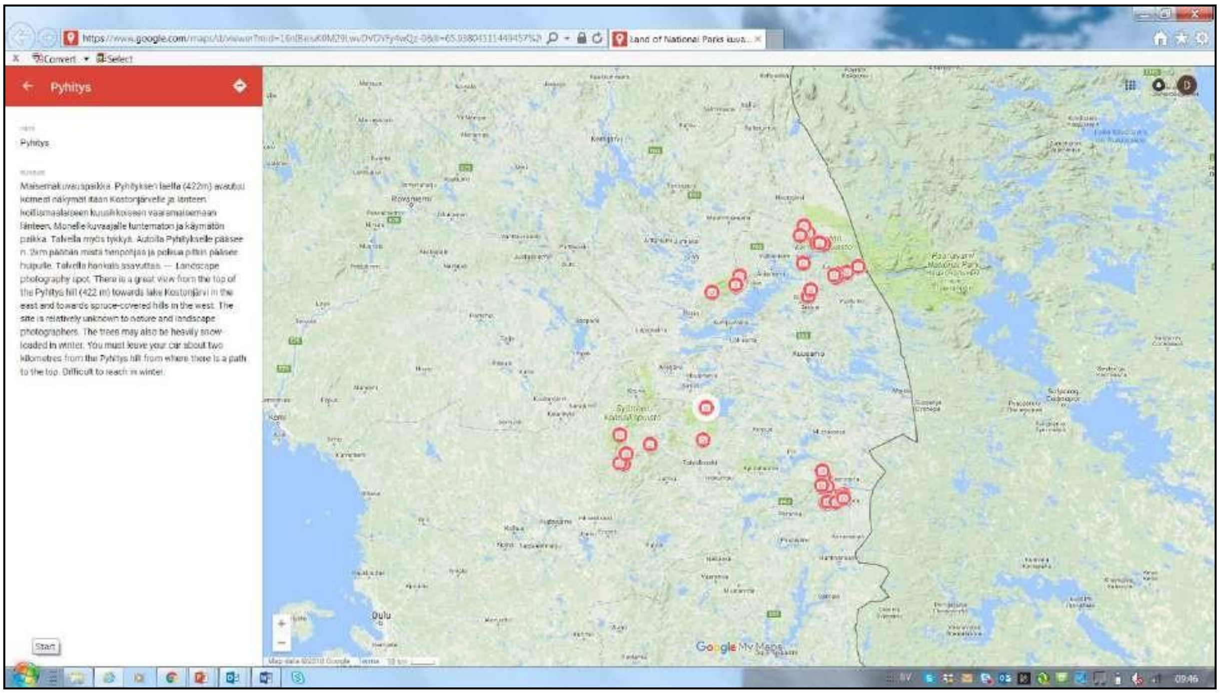


Figure 2.1.6. Screen shot from Google Maps of the best wild and/or nature photography locations in the “Land of the National Parks” destination.

Highlight 2: The Sauna-to-Sauna Cycle Tour

Another innovation that emerged from the SAINT-Finland cluster has been the development of the sauna experience as a slow adventure product. The sauna experience offers customers a range of authentic Finnish sauna experiences and relies on the use of a sauna guide. Guiding is essential for the experience because it gives customers access to the unique cultural context and practices that define the Finnish sauna experience. In other words, the guide transforms the experience from "just another sauna" to something uniquely Finnish. Interestingly, the SAINT-Finland cluster saw an opportunity to create a series of "sauna tours" as a way to create additional business opportunities. This example reflects on the concept to create a sauna-to-sauna cycle tour, and the opportunity to package together several assets into new products. Figure 2.1.7 offers a map of one of the proposed sauna-to-sauna cycle tours, and Figure 2.1.8 provides an example of a current sauna tour offer.

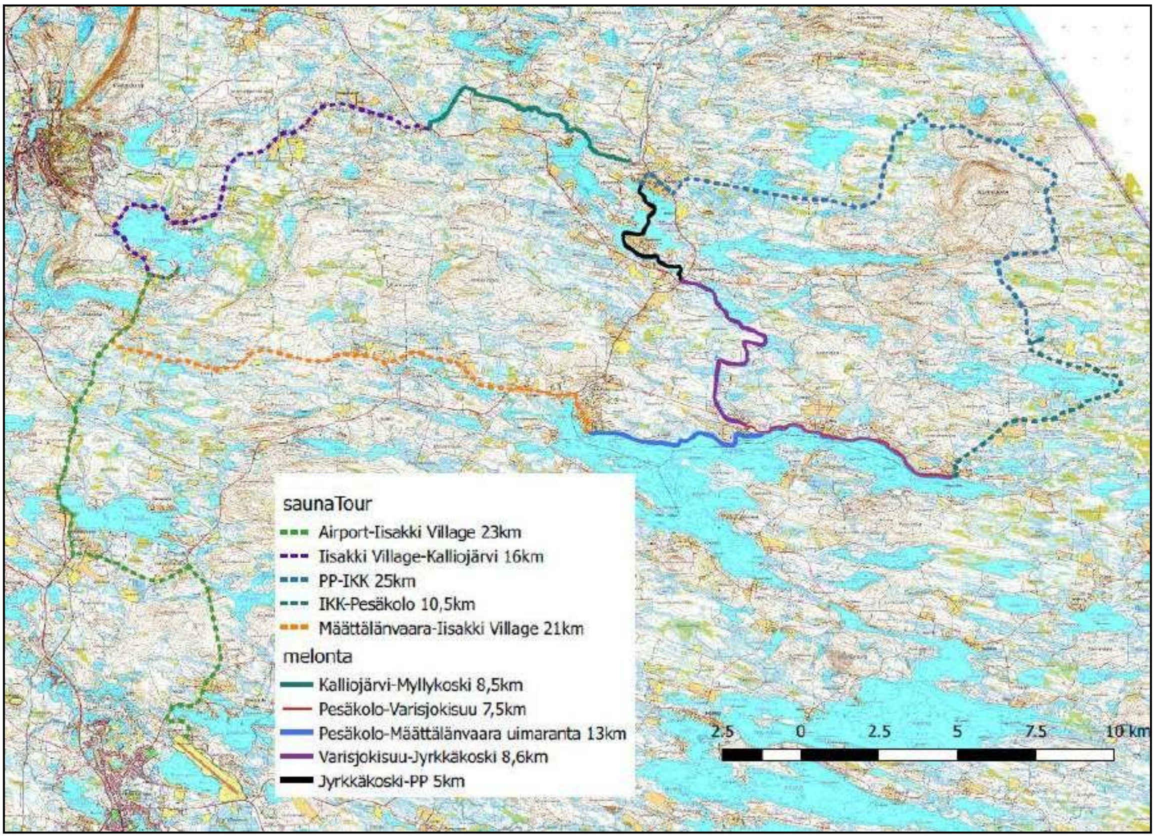


Figure 2.1.7. Proposed sauna-to-sauna cycle tour.

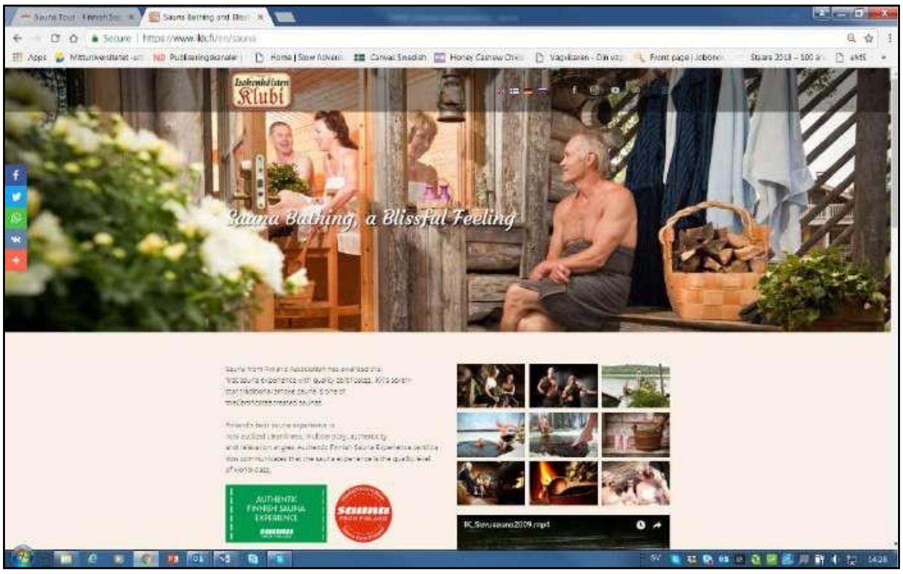


Figure 2.1.8. Sauna tour offer.

2.2. Iceland

Created in 2007, the Vatnajökull Region (www.visitvatnajokull.is) is the tourism, food and cultural cluster of Southeast Iceland. The cluster currently has around 80 partners (shareholders), including almost all of the main tourism enterprises in the area. Most of these enterprises are owned by local people that reside in Hornafjörður municipality. The municipality borders on the South area of Vatnajökull National Park, which is the main tourist attraction in this part of Iceland, with many outlet glaciers and glacier lagoons, as well as mountain ranges and lowland areas.

The Vatnajökull Region is home to a growing and moderately diverse set of nature-based tourism activities. The majority of these involve glacier landscapes in one way or another. The number of SMEs offering outdoor activity tours has increased considerably in recent years, spurred on by the large increase in tourist arrivals to Iceland (25-30% per annum for five years in a row). Increased low season tourism (in particular as of 2013) has also had a large impact, especially on ice cave tours, which are in very high demand. These are only available during the "deep" winter (early November to late March).

The case study in Iceland involves creating a "sub-cluster" within the Vatnajökull Region (VR), bringing together adventure tour SMEs and local food providers and caterers. Some individual companies already provide both essential elements for Slow Adventure, i.e. non-motorized immersive activities in nature and local/slow food, and can in many cases also provide accommodation. Other companies provide only one of these elements – these would then have to team with other companies to provide the full slow adventure experience.

A preliminary list of core candidates for the Icelandic case study includes 11 companies. There are an additional 5-15 potential new members within the total VR cluster as well. It is envisioned that once the SAINT cluster has been established, more companies will wish to participate, thus moving the overall tourist experience in the region closer to the slow adventure ideal over time.

Along with the region's SMEs, other key actors include the manager of the Vatnajökull Region, the tourism officer of Hornafjörður municipality, the manager and specialists of Vatnajökull National Park and the staff of East Skaftafell County Upper Secondary School.

The main goal of this case study is to establish a slow adventure sub-cluster within the Vatnajökull Region, whose members would then work together in marketing themselves and the area as a prime environment for this type of tourism activity. The second goal of the project is to increase the SMEs knowledge and use of social media, mobile technologies and visual methods of marketing purposes. Support is necessary here as most of the companies in question are (still) fairly small – typically family-run or owner/operator businesses ("lifestyle entrepreneurs") – and thus with both limited time and funds to devote to marketing. Often they also lack the basic skills to set up a web-based platform for their products or services. The third goal of the project is to encourage – and influence – the development of the area as a whole as a first-choice environment for a wide range of outdoor activities, in particular walking, hiking and mountaineering. Some steps in this direction have already been taken with the recent development of two new hiking paths (each around 10-15 km in length) near the margin of Vatnajökull glacier. These paths are part of a larger project to develop a hiking trail (called "Jöklaleiðin" – the Glacier Trail) – following the margin of the glacier from one end of the area to another, a total distance of about 150 km.

Survey Results

The SMEs in the Icelandic cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 2.2.1,transportation, organization of tours, accommodation, dining, guiding services and information provision are the business services that respondents rank as most relevant, while commercial fishing, hire or sale of activity equipment, agriculture and organization of festivals and events are less relevant.

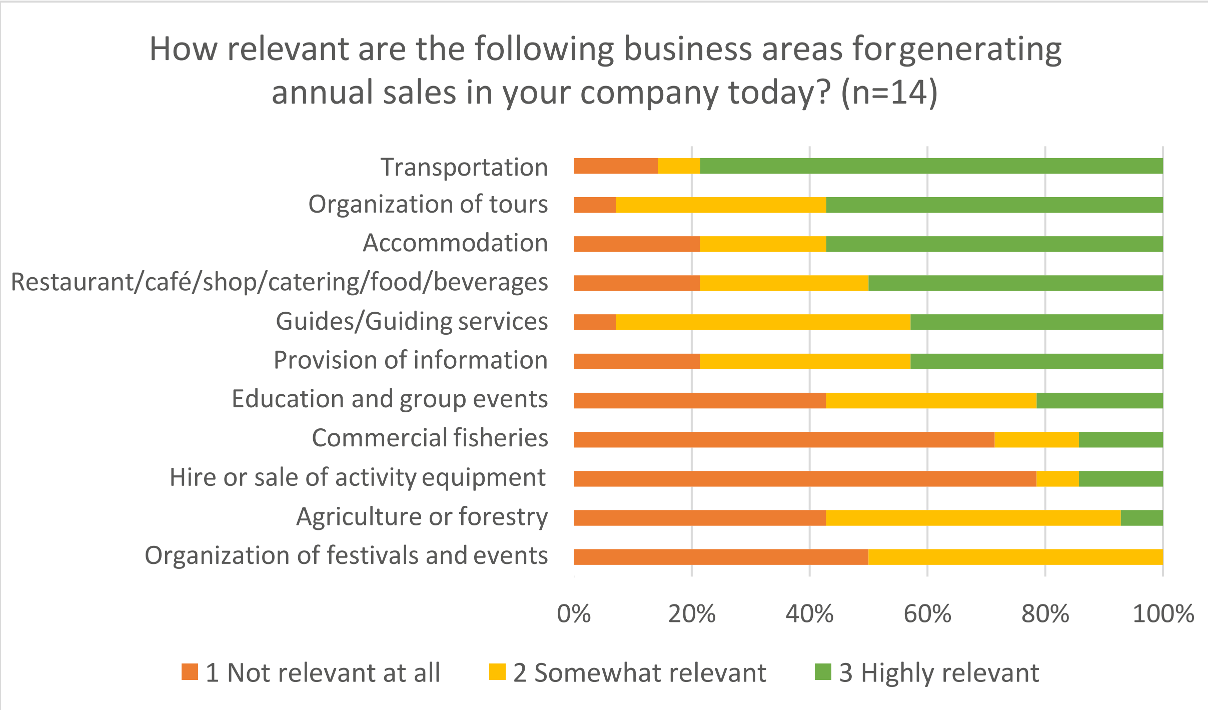


Figure 2.2.1. Relevant business areas

Transportation is more relevant for Icelandic SMEs in comparison with SMEs in other countries, while hire and sale of activity equipment, festivals and events, and education and group events are less relevant for the Icelandic cluster than for SMEs in the other parts of the SAINT project's transnational cluster.

Table 2.2.1 provides information on the number of employees in the SMEs within the Icelandic slow adventure cluster. Two out of 14 SMEs have no full-time employees, 50% employ 1-3 full time employees, and four SMEs (28%) report the company employed at least six year-round, full time employees. In total, 64% of SMEs indicated that they have one to ten employees engaged in nature-based tourism (NBT) activities. Additionally, 64% of SMEs employ seasonal full time employees and 62% employ seasonal part time employees, while the proportion SMEs with full time and part time employees engaged in NBT activities constitutes 35% and 31% respectively.

Table 2.2.1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	14%	7%	43%	7%	21%	7%	0%	100%
Year round part time employees	67%	17%	8%	0%	0%	8%	0%	100%
Seasonal full time employees	36%	0%	21%	7%	14%	14%	7%	100%
Seasonal part time employees	38%	15%	31%	15%	0%	0%	0%	100%
Number of employees engaged in NBT actitivities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	36%	14%	43%	0%	7%	0%	0%	**100%**
Year round part time employees	85%	0%	8%	0%	0%	8%	0%	**100%**
Seasonal full time employees	64%	0%	21%	7%	7%	0%	0%	**100%**
Seasonal part time employees	69%	15%	8%	8%	0%	0%	0%	**100%**

The Icelandic slow adventure cluster offers activities all year-around (Figure 2.2.2), as all of the months of the year are highly or somewhat relevant for generating annual sales to a substantial proportion of the SMEs in the cluster.

The peak season is from June to August. All 14 SMEs that responded to the survey identified this period as highly or somewhat relevant for income generation to their companies.

June and November have a significantly higher relevance to Icelandic SMEs compared to SMEs from other countries in the transnational cluster, while April was the least relevant, and its relevance is significantly lower compared to other countries.

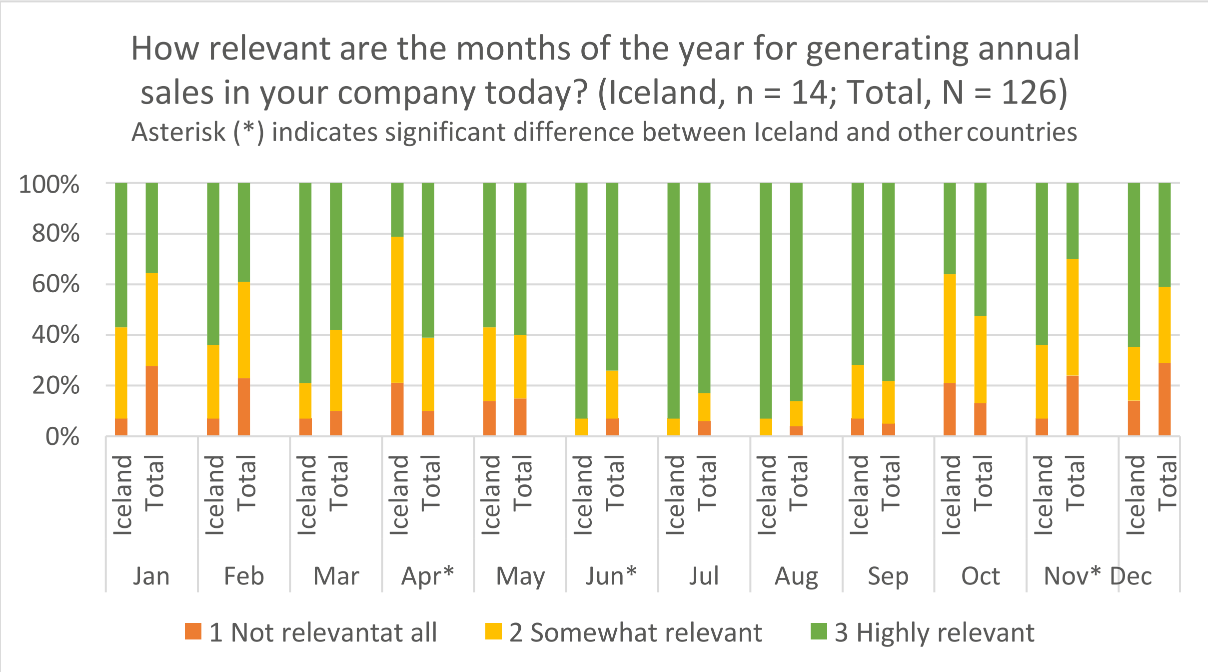
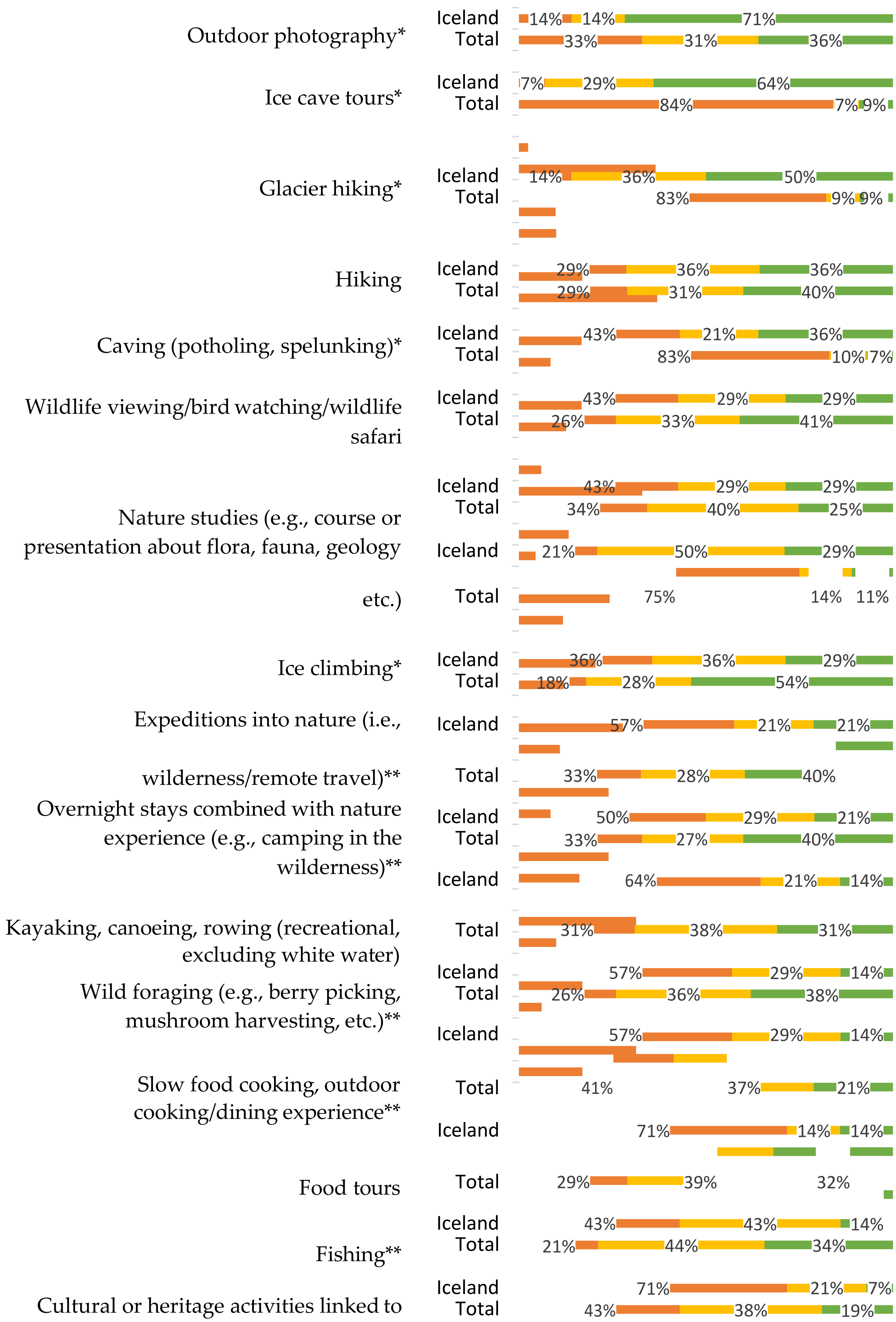


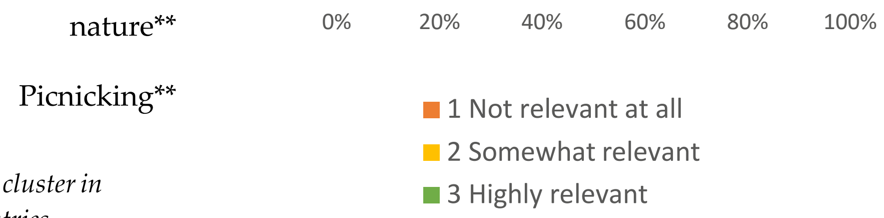
Figure 2.2.2. Seasonality.

Figure 2.2.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs representing the Icelandic cluster and/or the transnational slow adventure cluster as a whole. Activities such as ice cave tours, glacier hiking, caving and ice climbing clearly distinguish Iceland from other countries, as only few SMEs offer these activities in the other parts of transnational area.

Outdoor photography is an activity of high relevance for the transnational slow adventure cluster as a whole. Yet, its importance for sales generation for Icelandic SMEs is significantly higher compared to slow adventure SMEs in other countries. Additionally, hiking, wildlife viewing and bird watching, nature studies, recreational kayaking, canoeing and rowing, as well as food tours are relevant to a substantial proportion of Icelandic slow adventure SMEs. These activities are also highly relevant to SMEs in other countries and constitute the core part of the slow adventure experience offer of the transnational cluster.

Finally, there are several slow adventure activities that are considered core activities in terms of the transnational cluster, but which Icelandic study participants ranked as less relevant. These include expeditions into nature, overnight stays combined with nature experience, wild foraging, slow food cooking, fishing, cultural or heritage activities linked to nature and picnicking.


Outdoor photography*
Iceland 14% 14% 71%
Total 33% 31% 36%
Ice cave tours*
Iceland 7% 29% 64%
Total 84% 7% 9%
Glacier hiking*
Iceland 14% 36% 50%
Total 83% 9% 9%
Hiking
Iceland 29% 36% 36%
Total 29% 31% 40%
Caving (potholing, spelunking)*
Iceland 43% 21% 36%
Total 83% 10% 7%
Wildlife viewing/bird watching/wildlife safari
Iceland 43% 29% 29%
Total 26% 33% 41%
Iceland 43% 29% 29%
Total 34% 40% 25%
Nature studies (e.g., course or presentation about flora, fauna, geology etc.)
Iceland 21% 50% 29%
Total 75% 14% 11%
Ice climbing*
Iceland 36% 36% 29%
Total 18% 28% 54%
Expeditions into nature (i.e., wilderness/remote travel)**
Iceland 57% 21% 21%
Total 33% 28% 40%
Overnight stays combined with nature experience (e.g., camping in the wilderness)**
Iceland 50% 29% 21%
Total 33% 27% 40%
Iceland 64% 21% 14%
Kayaking, canoeing, rowing (recreational, excluding white water)
Total 31% 38% 31%
Iceland 57% 29% 14%
Wild foraging (e.g., berry picking, mushroom harvesting, etc.)**
Total 26% 36% 38%
Iceland 57% 29% 14%
Slow food cooking, outdoor cooking/dining experience**
Total 41% 37% 21%
Iceland 71% 14% 14%
Food tours
Total 29% 39% 32%
Iceland 43% 43% 14%
Fishing**
Total 21% 44% 34%
Iceland 71% 21% 7%
Cultural or heritage activities linked to
Total 43% 38% 19%



** - more relevant to slow adventure cluster in Iceland in comparison to other countries*

*** - less relevant to slow adventure cluster in Iceland in comparison to other countries*

Figure 2.2.3. Relevance of various slow adventure activities for generating annual sales

Figure 2.2.4 illustrates the extent to which various elements of slow adventure experience are included into nature-based tourism products currently offered by SMEs in the Icelandic cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 50% of Icelandic slow adventure SMEs identified already include the following activities, either to some extent or to a high extent, in the nature-based tourism products that they offer: nature interpretation, inspiring connectedness with nature, cultural interpretation, storytelling, wildlife tracking/watching opportunities and human-powered slow journeys. It is important to note that Icelandic SMEs consider human-powered slow journeys as an element of slow adventure experience to a significantly lower extent than compared with SMEs in other countries. Additionally, practical outdoor skills, local, wild or slow food, as well as outdoor living are significantly less represented in Iceland than in other parts of the transnational slow adventure cluster.

When asked about their willingness to include all elements of slow adventure into new nature-based tourism products, Icelandic SMEs responded that they are interested in doing so to a higher extent than what they offer today. In addition, local, wild or slow food and physical wellness are the two elements that Icelandic SMEs are willing to include, or increase the most, into new NBT products compared to the other products that they currently offer. When compared to the transnational cluster as a whole, Icelandic SMEs are significantly less interested in integrating practical outdoor skills and outdoor living into new NBT products than SMEs in other countries.

Only 5 out of 14 SMEs in Icelandic slow adventure cluster reported that they offer some form of accommodation to their guests, including guest house (3 SMEs), farm stay (2 SMEs), bed and breakfast home stay (1 SME) and rental of apartments (1 SME). All SMEs providing accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various bodies, including the national and regional tourism bodies, local co-operative groups and Airbnb. In addition, two companies reported that 75% of the ingredients used in their menu were produced locally, and two more companies that 50% of the ingredients used in their menu were produced locally.

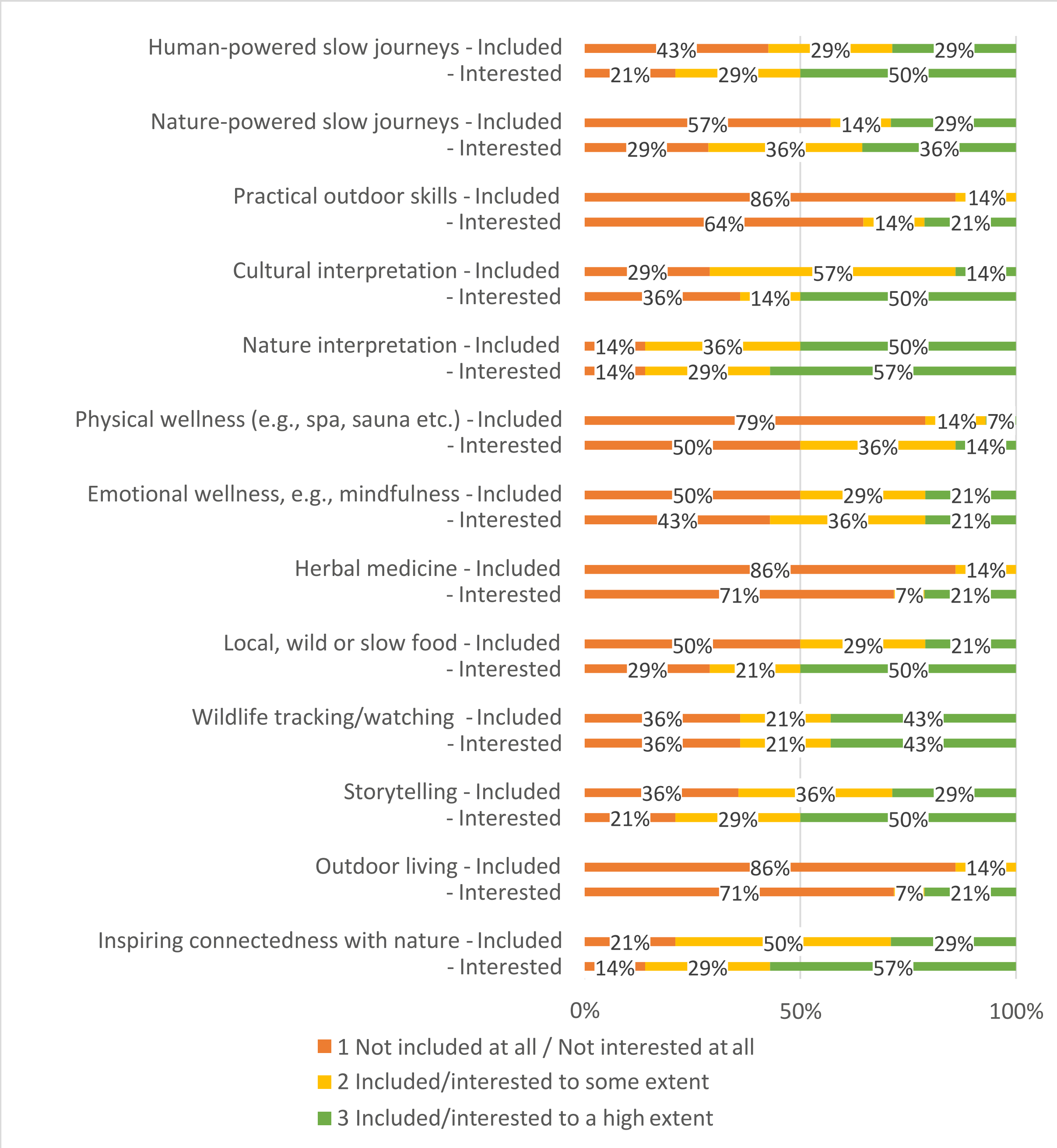


Figure 2.2.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=14)

The survey also included open-ended question about opportunities and threats of the introduction of a new “slow adventure” brand to market nature-based activities in Iceland. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *Increased duration of stay*: According to study participants, the opportunities are huge. Respondents further noted that, “we need to realize that it is important that travelers know in advance of the possibilities offered by the area, so they consider staying longer.”

- *Promotion of the local area*: Study participants reflected on the potential for slow adventure to help market the local area as a destination.

- *Year round business potential*: Slow adventure has the potential to diversify the tourism offer, thereby strengthening businesses through year-round opportunities. This, in turn, can help create the need for more employees in the tourism sector.

- *Awareness of natural and cultural assets*: Study participants felt that slow adventure can help the region better utilize nature and inform visitors about the area’s history, culture and current issues such as climate change. The opportunity to improve awareness applies to both SMEs as well as guests visiting the area.

- *From competition to cooperation*: Another theme that emerged was the idea that the slow adventure concept can business collaboration, which helps improve customer experiences as well as marketing opportunities.

Threats

Only a few study participants identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Crowding and carrying capacity*: Study participants raised concerns about the possibility of too many visitors. This is an important issue in other parts of Iceland as the country’s tourism sector has grown exponentially in the last decade.

- *Market capacity*: Some study participants expressed concern about the market capacity for yet another brand in an already saturated market space.

Case Study Results and Findings

The Iceland case study focused on marketing through social media and visual aids, and employed a community/holistic clustering approach (as described in Table 1).To initiate their cluster, the SAINT-Iceland team conducted the following activities:

- The SAINT-Iceland team convened an initial digital marketing workshop (in December 2016) to kick off the slow adventure cluster. This initial workshop was followed by a series of additional workshops and meetings in the region. Through these activities, 16 local companies were active in the cluster, all within the Hornafjordur area in rural southeast Iceland. Most of these SMEs are tour operators, some of which offer food and/or accommodation as well. The other main group are restaurants. The activities offered by the tour operators are quite varied, but most of them are glacial related as the Vatnajokull glacier is the main tourist attraction for the area. The SMEs also offer walking tours and bike tours.

- The SAINT-Iceland team engaged the national DMO, Promote Iceland and regional DMO, Visit South Iceland, which further strengthened the marketing for Icelandic slow adventure products. The project coordinator also worked with the local DMO, Visit Vatnajökull, on developing a landing page for the Icelandic part of SAINT on the DMO´s new website. This landing page was successfully launched at the end of 2017 (https://visitvatnajokull.is/slow-adventure/).

- The SAINT-Iceland team took an active part in the development of an Erasmus+ application for a new project called Adventure Tourism in Vocational Education and Training (ADVENT), which is led by East Skaftafell County Upper Secondary School (FAS). FAS is an associate partner of SAINT, and includes some of the SAINT project partners from Finland and Scotland. ADVENT builds on the contacts established with adventure tourism companies in the SAINT project and is an important synergy achieved during the project.

The SAINT-Iceland team also conducted targeted marketing activities in order to support the development of their slow adventure cluster. These marketing activities included:

- Analysis and distribution of the results from the ITRC report about market segmentation (see WP2) to the cluster. These results were utilized to develop the marketing strategy for the SAINT-Iceland cluster.

- The SAINT-Iceland team actively marketed the cluster and its associated slow adventure products in various social media outlets. Along with "posting" activities (i.e., Facebook, etc.), the SAINT-Iceland team developed a promotional video in collaboration with partner SMEs. The video uses material supplied by the partner SMEs, and the production of the video was funded by a separate grant obtained by the South Iceland Development Fund. While the video constitutes an important market tool, the investment made by the South Iceland Development Fund in producing the video is another indication of the business potential of the slow adventure concept.

Through these clustering and marketing activities, the SAINT-Iceland team helped to facilitate a growing number of slow adventure packages that are currently on the market. At the time of this writing, there are six different types of packages, each of which require an effective slow adventure cluster to deliver the product.

Highlight 1: Understanding Segmentation for Slow Adventure in Island

The SAINT-Island team conducted a comprehensive segmentation study of potential inbound visitors to Island (see Figure 2.2.5). The study identified the personality characteristics of the "slow adventurer" in order to inform future product development and marketing strategies. The study also made clear that there is a large segment of potential travelers to Iceland that "exhibit all or at least most of the slow adventure characteristics" (p. 25). The full report is available here: http://www.rmf.is/static/research/files/05-2016-slowadventurer_lokpdf.

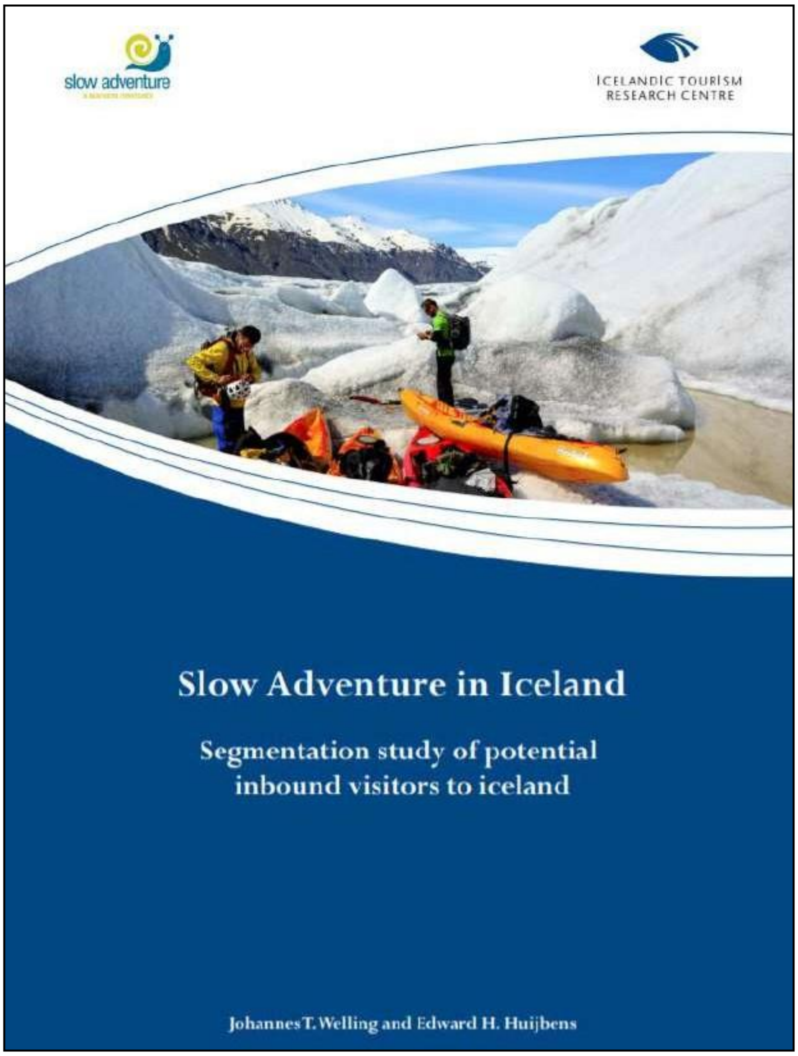


Figure 2.2.5. Slow Adventure in Iceland: Segmentation Study of Potential Inbound Visitors to Iceland.

Highlight 2: Slow Adventure Packages

Another highlight from the SAINT-Iceland cluster was the use of the the slow adventure brand to promote new packages in association with Visit Vatnajökull. Vatnajökull Region Ltd., established in 2007, is the tourism, food and cultural cluster of Southeast Iceland. The company also operates a booking and marketing service (www.visitvatnajokull.is) for its shareholders which now number around 80, including most of the main tourism enterprises in the area. Most of these companies are owned by local people, residing in Hornafjörður municipality. The Vatnajökull Region is home to a growing and fairly diverse set of nature-based and/or adventure tourism activities. The majority of these involve glacier landscapes in one way or another and thus also take place within the borders of Vatnajökull National Park. Figure 2.2.6 offers a screen capture of how some of these new slow adventure products are marketed.

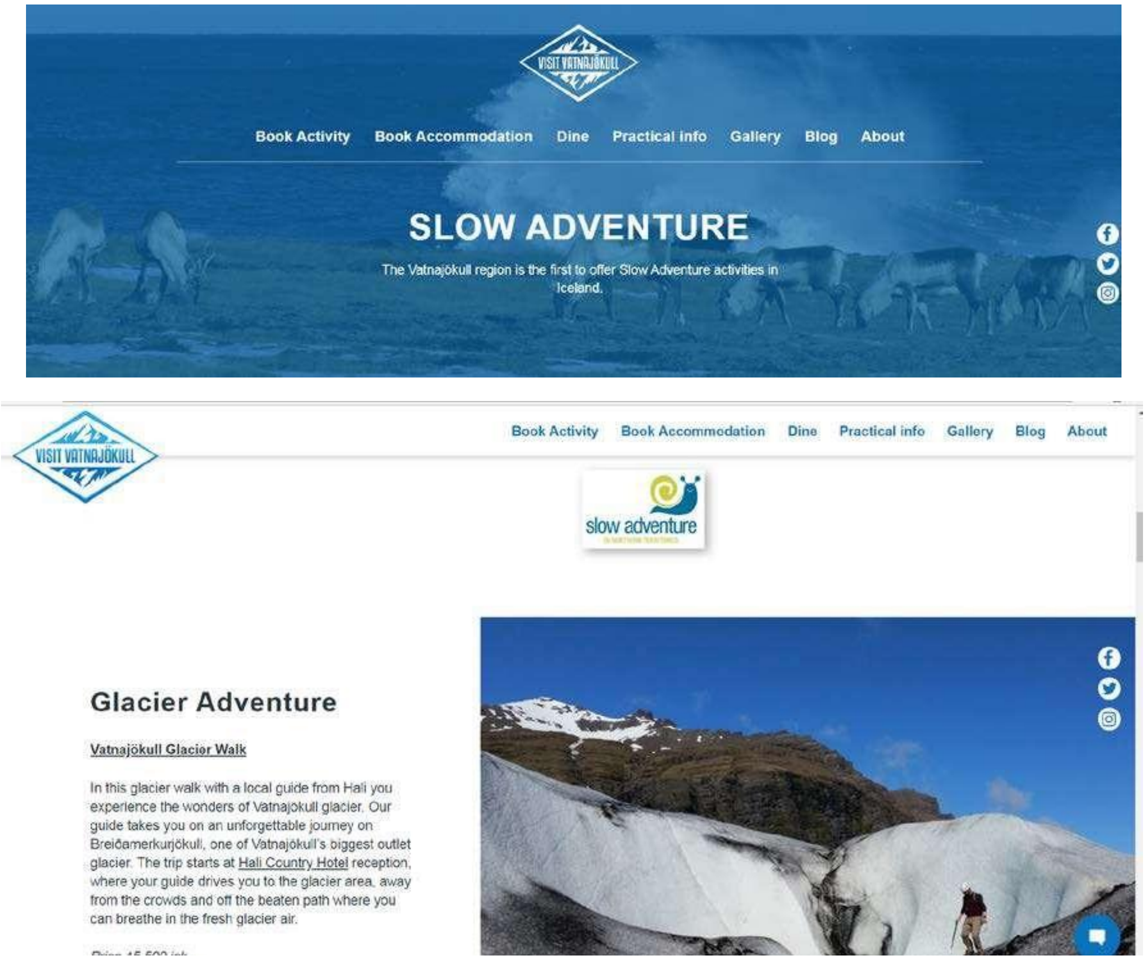


Figure 2.2.6. Slow Adventure Packages on the Visit Vatnajökull website.

2.3. Ireland

The slow adventure concept is a perfect fit for County Leitrim, which is the SAINT- Ireland project area. Leitrim is a sparsely populated county with unspoiled landscapes and lower numbers of tourists compared to other parts of Ireland. We feel that this context can be a strength. By establishing the concept of slow adventure in this area, we intend to identify new markets for future growth within the tourism sector.

Our vision is to see this concept grow and become internationally recognizable, and we would like to see if the concept opens opportunities for our SME's to promote their slow adventure offers in international markets.

This case study includes three phases:

- Phase 1: Establishment of criteria for slow adventure tourism.

  Our aim is to define a complete set of slow adventure guidelines that can be applied across the transnational partnership. Such criteria will make it attractive and easy for SME's to join the slow adventure movement and business concept. The use of the slow adventure logo is an important example of this issue. To add value, the logo needs to be used effectively and strategically. Misuse of the logo can easily damage the slow adventure brand and related marketing efforts. This raises important questions about the establishment of guidelines in order to protect the brand. To address this issue, the SAINT-Ireland team will

  - Research the relevant issues related to each of partner country.
  - Identify gaps and make recommendations for establishing slow adventure guidelines.
  - Test the new guidelines over the period of the case study.

- Phase 2: Communication and promotion of slow adventure to regional SMEs.

  This phase of the case study involves a kick-off workshop in which all of the interested tourism provides will be invited to attend. The purpose of the workshop is to inform SME's about slow adventure, the benefits of becoming involved, and encourage SMEs to sign up for a slow adventure pilot scheme.

  Interested SMEs will be invited to participate in a pilot scheme, and the SAINT-Ireland team will choose 15 SMEs to undergo an external assessment. The assessor will visit and experience each of their products and identify if the slow adventure products are eligible or if further work is required to bring the offers to the next level.

- Phase 3: Test marketing and cluster development.

  Once the SAINT-Ireland team has identified approximately 10 SMEs that meet the criteria (as described in the points above), we will develop two slow adventure clusters that offer a minimum of three activities.

  As part of the overall evaluation of our cluster marketing, the SAINT-Ireland team plans to conduct survey research targeting consumers who booked packages and request feedback.

We will also identify a family and conduct 'mystery shopping' research where the family will select and book a package, partake in all activities and record the experience. This information will provide important insight into consumer behavior, which can be distributed to the SMEs in the SAINT-Ireland cluster.

Survey Results

The SMEs in the SAINT-Ireland cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 2.3.1, accommodation, dining, information provision, organization of tours, and organization of festivals and events are the business services that respondents rank as most relevant. These activities are also more relevant for SAINT-Ireland SMEs in comparison with SMEs in the other parts of the SAINT project's transnational cluster. Agriculture and forestry is a business area that is less relevant (or important) for SMEs in the SAINT-Ireland cluster.

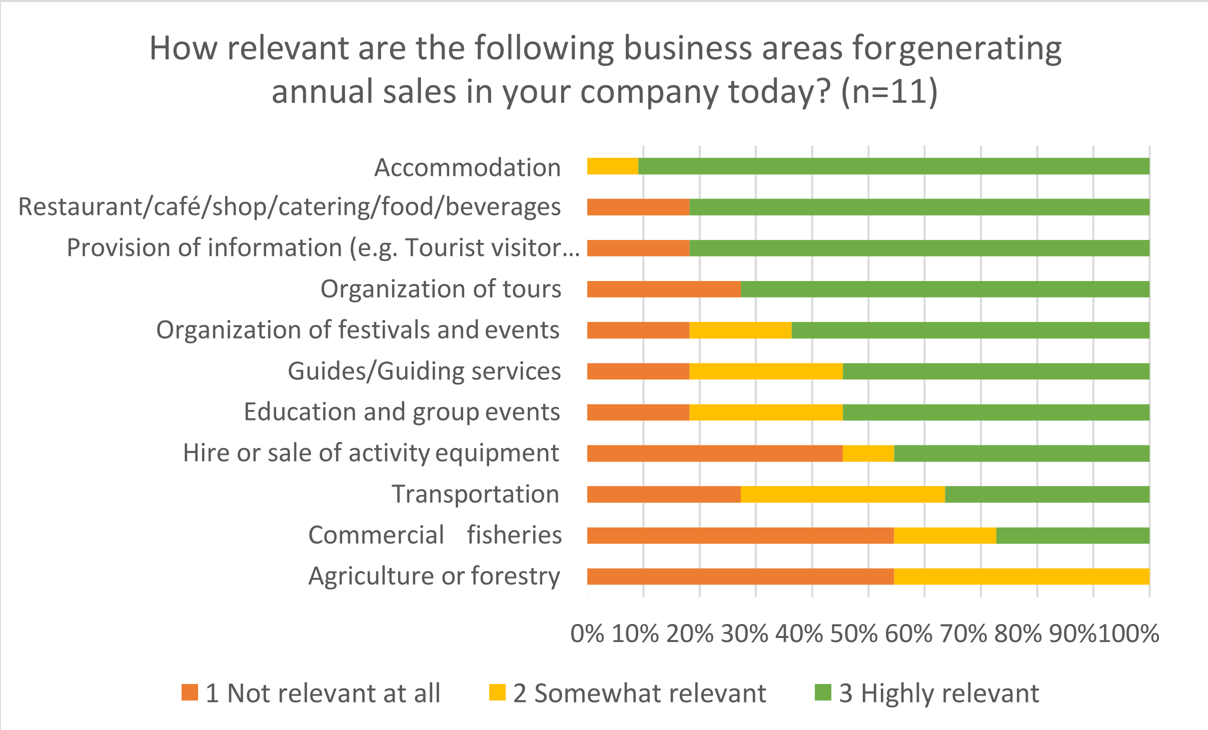


Figure 2.3.1. Relevant business areas

Table 2.3.1 provides information on the number of employees in the SMEs within the SAINT-Ireland slow adventure cluster. Four out of 11 SMEs have no full-time employees, 55% employ 1-10 full time employees, and one SME reports that their company has more than 20 year-round, full time employees. In total, 36% of SMEs indicate that they have one to five employees engaged in nature-based tourism (NBT) activities. In addition, 18% of SMEs employ seasonal full time workers and 45% employ seasonal part time workers, while the proportion of SMEs with full time and part time employees engaged in NBT activities constitutes 18% and 36% respectively.

Table 2.3.1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	36%	36%	9%	0%	9%	0%	9%	100%
Year round part time employees	36%	27%	9%	18%	0%	0%	9%	100%
Seasonal full time employees	82%	0%	9%	0%	0%	0%	9%	100%
Seasonal part time employees	55%	0%	27%	0%	9%	0%	9%	100%
Number of employees engaged in NBT activities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	64%	27%	0%	9%	0%	0%	0%	**100%**
Year round part time employees	64%	18%	0%	18%	0%	0%	0%	**100%**
Seasonal full time employees	82%	9%	0%	0%	9%	0%	0%	**100%**
Seasonal part time employees	64%	18%	18%	0%	0%	0%	0%	**100%**

The SAINT-Ireland slow adventure cluster offers activities all year-around (Figure 2.3.2), and all of the months of the year are highly or somewhat relevant for generating annual sales to a substantial proportion of the SMEs in the cluster.

The peak season is May to August. All 11 SMEs that responded to the survey identified this period as highly or somewhat relevant for income generation. These months have a significantly higher relevance to SAINT-Ireland SMEs compared to SMEs from other countries in the transnational cluster.

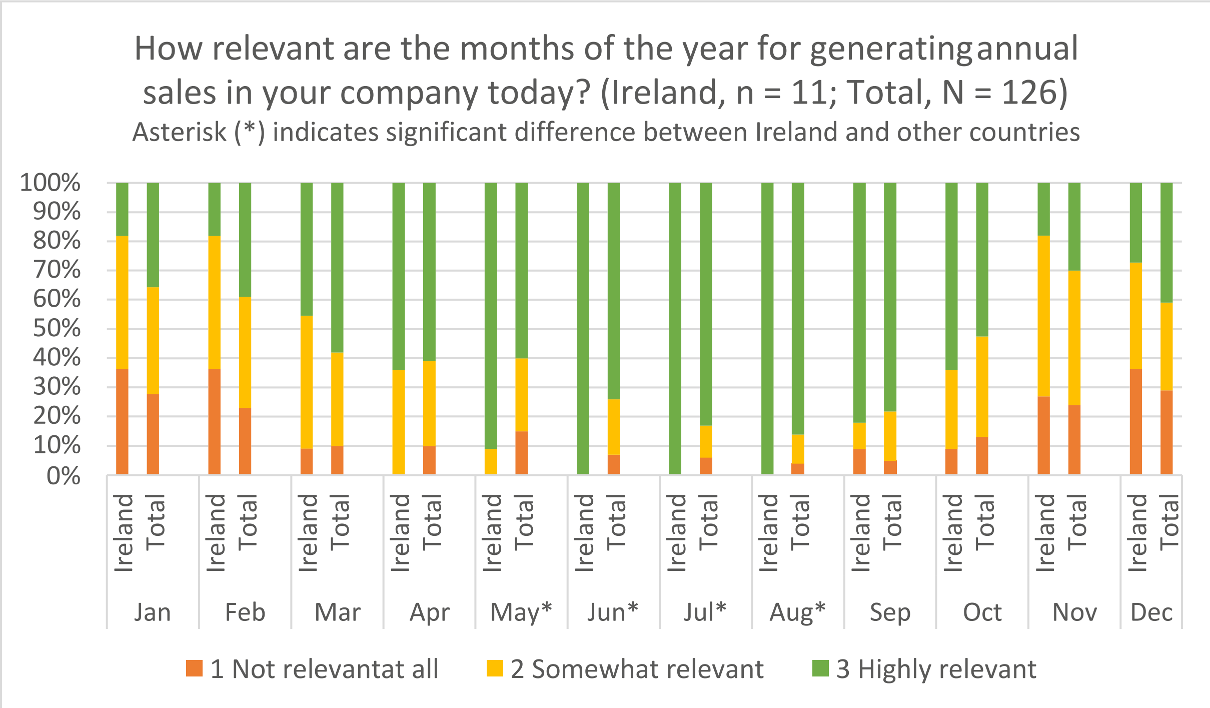
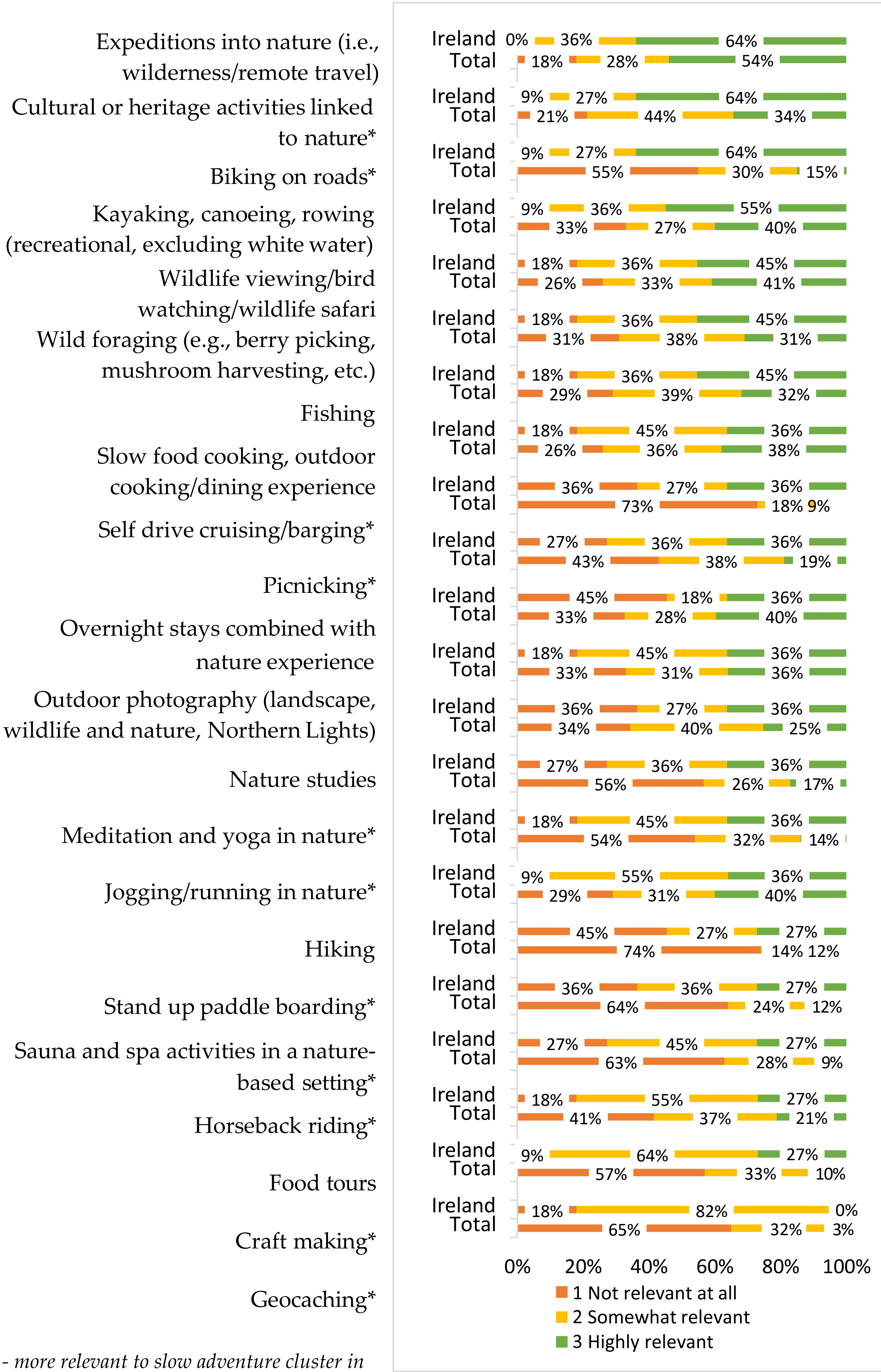


Figure 2.3.2. Seasonality

Figure 2.3.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of the SMEs that represent the SAINT-Ireland and/or the transnational slow adventure cluster as a whole. A range of slow adventure activities are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Ireland cluster compared to SMEs in other countries. These activities include biking on roads, self-drive cruising/barging, picnicking, meditation and yoga in nature, jogging/running in nature, stand up paddle boarding, sauna and spa activities in a nature-based setting, horseback riding, craft making and geocaching

Cultural or heritage activities linked to nature is an activity of high relevance for the transnational slow adventure cluster as a whole. Yet, its importance for sales generation for SAINT-Ireland SMEs is significantly higher compared to slow adventure SMEs in other countries. In addition, other activities, which are highly relevant to SMEs in other countries and constitute the core part of the slow adventure experience offer of the transnational cluster, are also relevant to a substantial proportion of SAINT-Ireland slow adventure SMEs. These include expeditions into nature, recreational kayaking, canoeing, rowing, wildlife viewing and bird watching, wild foraging (e.g., berry picking, mushroom harvesting, etc.), fishing, slow food cooking and outdoor cooking/dining experience, overnight stays combined with nature experience, outdoor photography, nature studies, hiking and food tours.



** - more relevant to slow adventure cluster in Ireland in comparison to other countries*

Figure 2.3.3. Relevance of various slow adventure activities for generating annual sales (n=11)

Figure 2.3.4 illustrates the extent to which various elements of the slow adventure experience are included into nature-based tourism products currently offered by SMEs in the SAINT-Ireland cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 80% of SAINT-Ireland SMEs already include the following elements, either to some extent or to a high extent, in the nature-based tourism products that they offer: cultural interpretation, inspiring connectedness with nature, storytelling, emotional wellness, e.g., mindfulness, nature interpretation, and outdoor skills.

When asked about their willingness to include the elements of slow adventure into new nature-based tourism products, SAINT-Ireland SMEs responded that they are interested in doing so to a higher extent than what they offer today. While 45% of SMEs include outdoor living in the NBT products that they currently offer, 91% of SMEs reported that they are interested in including this element into new NBT products that they might offer in the future. This is the largest increase in any of the 13 elements. Likewise, the SMEs are also highly interested to include nature-powered slow journeys and herbal medicine to a substantially higher extent than offered today.

When compared to the transnational cluster as a whole, SAINT-Ireland SMEs are significantly more interested in integrating nature-powered slow journeys, outdoor skills, cultural interpretation, emotional wellness and storytelling into new NBT products than SMEs in other countries.

Eight out of 11 SMEs in the SAINT-Ireland cluster reported that they offer some form of accommodation to their guests, including as follows:

- Bed and breakfast home stay (4 SME).
- Rental of cottages (4 SMEs).
- Guest house (3 SMEs).
- Hotel (2 SMEs).
- Rental of apartments (2 SMEs).
- Farm stay (2 SMEs).
- Castle stay (2 SMEs).
- Wild camping (1 SME).
- Glamping (1 SME).

Seven SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by the national tourism body. In addition, one company reported that 75% of the ingredients used in their menu were produced locally, and two more companies indicated that 50% of the ingredients used in their menu were produced locally.

Figure 2.3.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=11)

The survey also included open-ended question about opportunities and threats of the introduction of a new "slow adventure" brand to market nature-based activities in Ireland. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *Increased duration of stay*: Study participants reflected on the opportunity to increase the duration of stay with comments like this: "A broadening of the consumer base and extending stays".

- *Promotion of the local area, increase the exposure of peripherally located micro-sized enterprises especially to new international markets*: Study participants reflected on promoting the local area with comments like these: "Open up new markets from countries that wish to experience slow adventure"; "New market, increase occupancy"; "bringing more visitors to an unspoilt and clean environment"; "the terrain, the pace of life and the atmosphere here in Ballinamore is ideal for this concept"; "So many opportunities on a beautiful waterway and county"; "Leitrim is the perfect place for slow adventure with lots human propelled activities, locally produced food, history, storytelling".

Threats

Only a few study participants identified threats associated with the introduction of the slow adventure brand. These threats are market capacity, possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands. Study participants used comments like this: "withdrawal of marketing. Tourism Ireland only ever highlights main tourist counties in Ireland and we are left to do our own marketing".

Study participants have also addressed possible conflicts of interests with stakeholders from other industries along with potential environmental threats. Study participants expressed these concerns like this: "Any environmental threats such as pollution or in particular introduction of Shale Fracking in the area"; "the question of fracking will it happen or wont it happen"; "fracking". However, fracking is now banned in the SAINT-Ireland region and does not pose a threat at the moment. Interestingly, study participants did not mention Brexit, which has the potential to bring fluctuations in currency and, therefore, will influence where people will holiday. Brexit may also lead to increased regulations for Irish Travel Agents and higher travel costs for consumers travelling to and from Ireland.

Case Study Results and Findings

The Ireland case study focused on development of a "holistic" slow adventure cluster, as described in Table 1. To initiate their cluster, the SAINT-Ireland team conducted the following activities:

- On receipt of expressions of interest from SMEs in the region, an assessment panel was prepared on providers who met the eligibility criteria for slow adventure.

- The SAINT-Ireland team engaged an external assessor who met individually with all SMEs. The assessor visited their premises, learned about their products and in most cases, took part in their activity. A final report was delivered with recommendations that described (i) activities that were ready and that could be used to form clusters, (ii) activities that still needed further development before they could contribute to the cluster, and (iii) activities that were not suitable for the slow adventure cluster.

- The SAINT-Ireland team hosted a series of workshops and study visits with SMEs in order to develop slow adventure experiences and packages. In addition, the SAINT-Ireland team engaged a mentor to work directly with SMEs to develop slow adventure products and the cluster. The mentor initial worked with SMEs on a one-to-one basis and then later within specific groups.

- Perhaps the most important activity for the SAINT-Ireland team was the development and pilot testing of criteria for slow adventure. The SAINT-Ireland team conducted extensive research and prepared a discussion document, which was presented at the SAINT transnational meeting in Sweden (March 2017). This process fed into collaboration with the lead partners (SAINT-Scotland) to develop guidelines for the use of the SAINT logo.

The SAINT-Ireland team also conducted marketing activities in order to support the development of their slow adventure cluster. These marketing activities included the following:

- The SAINT-Ireland team engaged a social media company to pilot test the market with our slow adventure packages.

- Development of a slow adventure marketing brochure in which packages were priced. The brochure's content and artwork were designed in digital format (see Figure 2.3.5).

- The SAINT-Ireland team developed a series of digital films that featured the summer season. The films highlighted slow adventure experiences with each of the 11 SMEs in the region. These videos were also edited into nine, shorter "cluster" films and one overall slow adventure video for the SAINT-Ireland region.

- The SAINT-Ireland team we hosted the "Let's Go Slow" bloggers. These bloggers to help promote the SAINT-Ireland slow adventure experience.

Figure 2.3.5. Examples of digital marketing advert for SAINT Ireland

From the activities described above, clusters were identified and developed into nine new slow adventure experiences and products.

Highlight 1: Development and Pilot Testing of Slow Adventure Criteria

The SAINT-Ireland cluster developed a set of pilot guidelines for the use of the slow adventure logo and brand. These guidelines, or criteria, were developed and pilot tested through a process that included participation of 15 SMEs. The outcome from the case study were the Slow Adventure Guidelines document (see Figure 2.3.6, or the SAINT project website: http://saintproject.eu/), which provides a structured approach to use of the SAINT logo and brand. The document defines the eligibility of potential slow adventure products and establishes clear guidelines for use of the logo. Finally, this process led to the establishment of a contact person in each partner country for use of the logo and brand.

Northern Periphery and Arctic Programme

EUROPEAN UNION

slow adventure

SLOW ADVENTURE GUIDELINES

A structured approach to creating slow adventure tourism products and experiences and use of the logo

MAY 2017

4. Is My Slow Adventure Product Eligible?

There are a number of core criteria for SMEs seeking to offer a slow adventure experience. A slow adventure MUST incorporate:

- Human- or nature-powered journeys (excluding transfers)
- An inspiring connection with the outdoors
- Environmental and cultural interpretation
- Local, wild or slow food
- Elements of storytelling, to convey the importance of the above elements

In addition, it is DESIRABLE that a slow adventure incorporates some or all of the following elements:

- Outdoor engagement:
  - Practical outdoor skills e.g. bushcraft, fishing, making camp, foraging
  - Greater cultural interpretation - local/indigenous traditions, heritage, stories, music, crafts
- Natural wellness:
  - Physical
  - Emotional e.g. mindfulness
- Herbal medicine
- Wildlife tracking/watching opportunities
- Outdoor living

A slow adventure should be a minimum of one-day, or a multi-day experience.

- For a one-day experience it should consist of the following:
  - Activity/activities
  - Locally produced food and drink
  - Guided when possible
  - Rural location
  - Connection with culture, heritage and community
  - Transition from one element to the next is seamless
- For a multi-day experience it should consist of the following:
  - Accommodation which has an affinity with the surrounding nature
  - Locally-produced food and drink
  - Guided when possible
  - Rural location
  - Connection with culture, heritage and community

In both cases, *the experience should be the result of a collaboration between local SMEs*, and the physical and emotional connections between the different elements should be communicated to the consumer. In exceptional circumstances, individual SMEs which offer a range of clustered experiences (incorporating an activity, plus accommodation and food for example), or which offer a single experience which 'ticks the slow adventures boxes', may be permitted to use the logo and brand; this will be at the discretion of the local slow adventure

3

Figure 2.3.6. Screen shot of the slow adventure guidelines document.

Highlight 2: Slow Adventure Customer Experience Survey

The SAINT-Ireland team undertook a review of customer experiences in their slow adventure context. The review was conducted in September 2015 over a two-week period using a defined methodology and a questionnaire provided by Leitrim County Council. The following slow adventure experiences were reviewed: (i) wild food foraging, (ii) open canoeing, (iii) camping, (iv) stand up paddle boarding, (v) hill walking, (vi) cycling, (vii) bird watching, and (viii) fishing (see Figure 2.3.7).

Figure 2.3.7. Slow adventure activities in Leitrim (canoeing, cycling and stand up paddling).

The report developed a set of "slow adventurer" profiles, which were summarized as follows:

- The slow adventurer believes in the importance of spending time in and engaging with the natural environment to enhance the quality of their lives.
- They make time for nature and strive to achieve a work-life balance.
- They are internally motivated and open to experiences that are unique, educational and nature focused.
- Physical exercise is important, as is quality time shared with friends, family and like-minded others in the landscape.
- Self-time and a feeling of escapism are highly important motives for the slow adventurer and when they are achieved in nature, they prompt a strong sense of de-stressing in the individual.
- Positive emotions such as joy, peacefulness and appreciation are often linked to the natural beauty of the landscape and these emotions are intensified when experienced through adventure and activities in the outdoors.
- The slow adventurer has particular concern for issues such as the protection of the environment, safety in the environment and the quality of instruction they receive on courses and trips.
- Rather importantly, they are very likely to urge others such as family and friends to give it a go.

2.4. Northern Ireland

The SAINT-Northern Ireland team tested new marketing approaches as a way of developing more effective business generation through clustering (as described in Table 1).

The SAINT-Northern Ireland team proposed an original concept that focused on clustering around on a multi-use trail (or "Blue Way"). The Blue Way was intended to incorporate SMEs that offer slow adventure experiences alongside the existing canoe trail located in the region. The case study also encouraged SMEs to diversify by offering additional slow adventure experiences as well as encourage new business start-ups in the sector.

During initial stages of the case study, the SAINT-Northern Ireland team decided that the structure of themes and elements needed to be broaden to beyond the Blue Way to pilot test and for engagement. The case study presented below reflects this broader perspective.

Survey Results

The SMEs in the SAINT-Northern Ireland cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 1, education and group events, transportation, organization of festivals and events, as well as organization of tours are the business services that respondents rank as most relevant, while commercial fishing is somewhat relevant to just a few SMEs. Moreover, organization of festivals and events is more relevant for SMEs from Northern Ireland in comparison with SMEs in the other parts of the SAINT project's transnational cluster, while accommodation as a business area is less relevant.

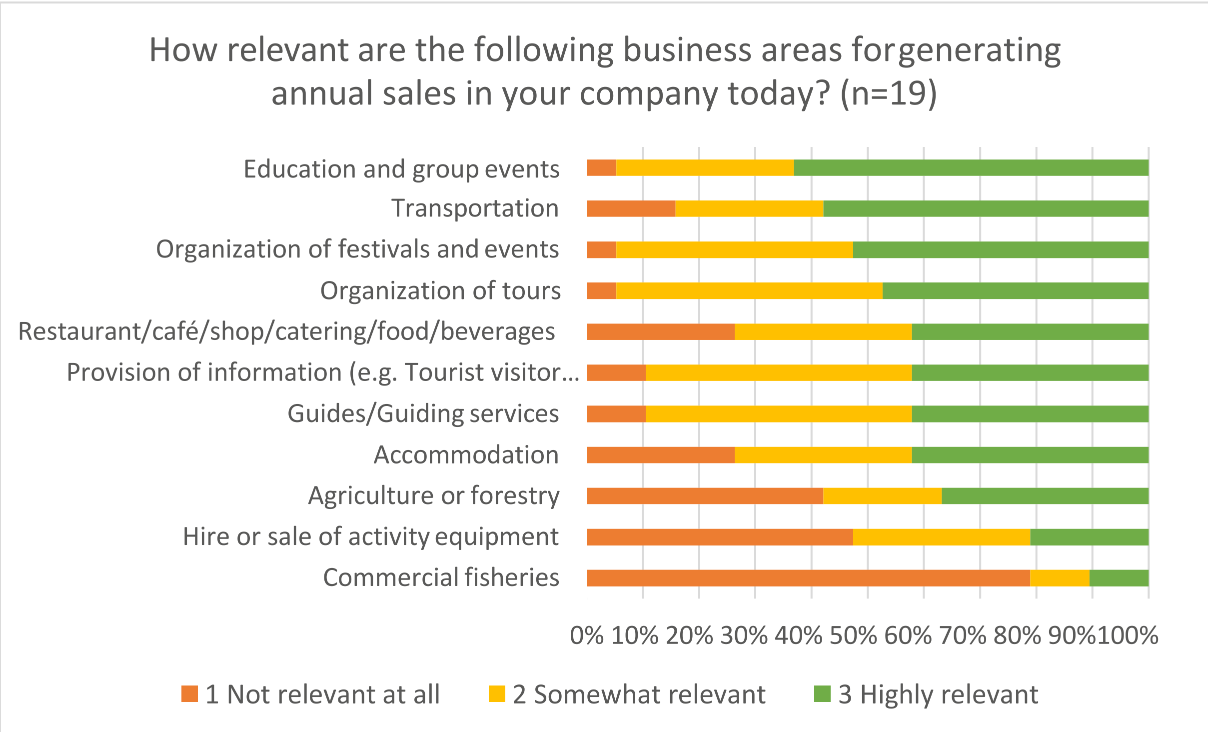


Figure 1. Relevant business areas

Table 1 provides information on the number of employees in the SMEs within the SAINT-Northern Ireland cluster. Almost half of SMEs have no full-time employees, 37% employ 1-5 full time employees, and three SME reports the company employed more than 10 full time employees. In total, 37% of SMEs indicated that they have one to five employees engaged in nature-based tourism (NBT) activities. Additionally, 26% of SMEs employ seasonal full time employees and 42% employ seasonal part time employees, while the proportion SMEs with full time and part time employees engaged in NBT activities constitutes 21% and 37% respectively.

Table 1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	47%	16%	16%	5%	0%	11%	5%	100%
Year round part time employees	42%	5%	26%	0%	16%	5%	5%	100%
Seasonal full time employees	74%	5%	5%	0%	11%	0%	5%	100%
Seasonal part time employees	58%	16%	5%	5%	0%	11%	5%	100%
Number of employees engaged in NBT activities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	63%	32%	0%	5%	0%	0%	0%	**100%**
Year round part time employees	58%	11%	26%	0%	5%	0%	0%	**100%**
Seasonal full time employees	79%	5%	5%	5%	5%	0%	0%	**100%**
Seasonal part time employees	63%	16%	5%	11%	5%	0%	0%	**100%**

The SAINT-Northern Ireland cluster offers activities all year-around (Figure 2), as all of the months of the year are highly or somewhat relevant for generating annual sales for a substantial proportion of the SMEs in the cluster. The peak season is from March to October. April, May, September, October and November have a significantly higher relevance to Northern Ireland SMEs compared to SMEs from other countries in the transnational cluster.

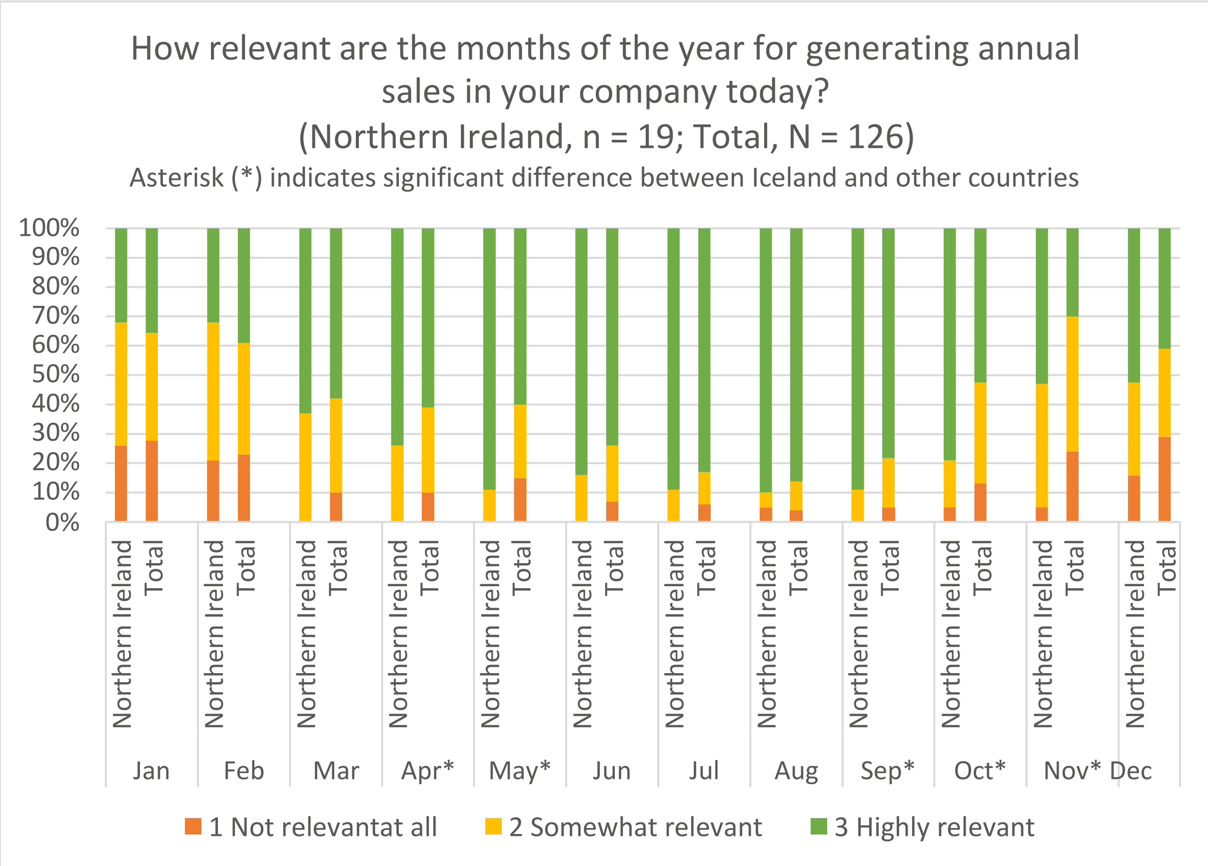


Figure 2. Seasonality

Figure 3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs representing the SAINT-Northern Ireland cluster and/or the transnational slow adventure cluster as a whole. Cultural or heritage activities linked to nature are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Northern Ireland cluster compared to SMEs in other countries. Fishing, however, is somewhat less important for SMEs in the SAINT- Northern Ireland cluster than for SMEs in the other parts of the transnational slow adventure cluster.

Cultural or heritage activities linked to nature*

Expeditions into nature (i.e., wilderness/remote travel)

Food tours

Wild foraging (e.g., berry picking, mushroom harvesting, etc.)

Wildlife viewing/bird watching/wildlife safari

Slow food cooking, outdoor cooking/dining experience

Overnight stays combined with nature experience (e.g., camping in the wilderness, treetop cabins, igloos etc.)

Outdoor photography (landscape, wildlife and nature)

Nature studies (e.g., course or presentation about flora, fauna, geology etc.)

Hiking

Kayaking, canoeing, rowing (recreational, excluding white water)

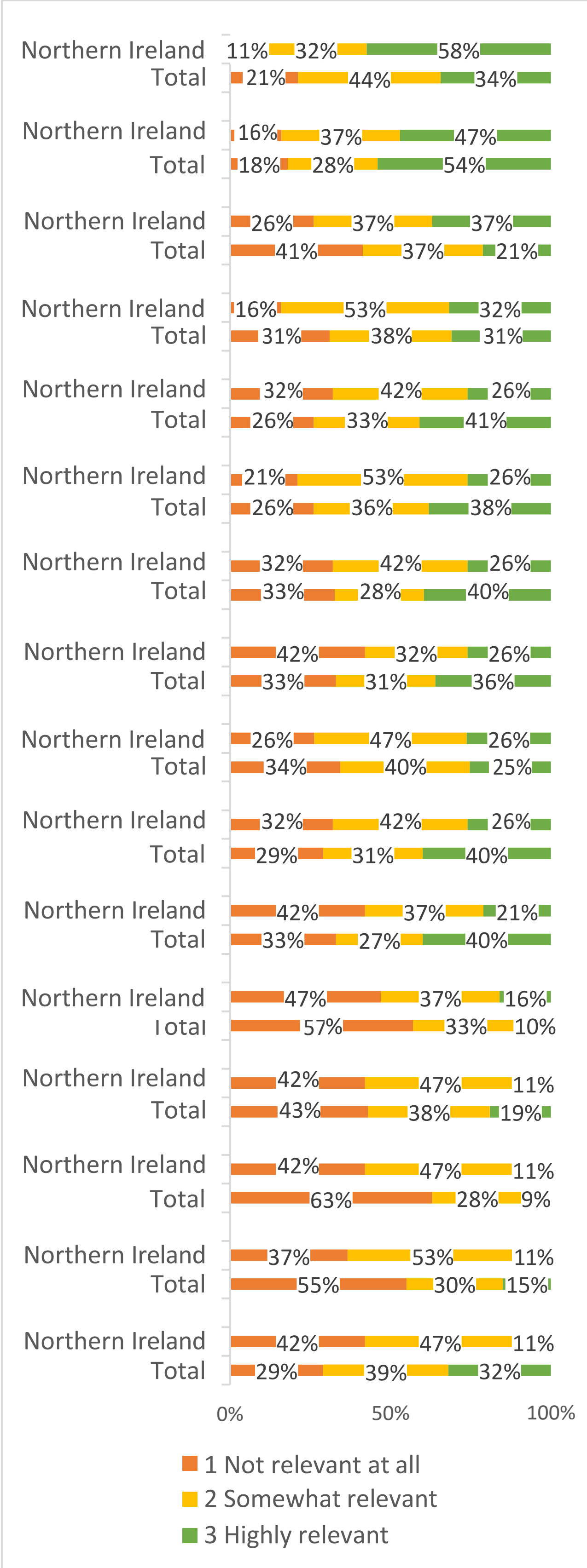
Craft making

Picnicking

Horseback riding

Biking on roads

Fishing**



** - more relevant to slow adventure cluster in Iceland in comparison to other countries*

*** - less relevant to slow adventure cluster in Iceland in comparison to other countries*

Figure 3. Relevance of various slow adventure activities for generating annual sales (n=19)

Figure 4 illustrates the extent to which various elements of slow adventure experience are included into nature-based tourism products currently offered by SMEs in the Northern Ireland cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that integrate elements of the slow adventure experience.

More than 70% of Northern Ireland slow adventure SMEs identified already include the following elements, either to some extent or to a high extent, in the nature-based tourism products that they offer: cultural interpretation, nature interpretation, human-powered slow journeys, as well as local, wild or slow food. Northern Ireland SMEs integrate cultural interpretation to a significantly higher extent compared with SMEs in other parts of the transnational slow adventure cluster.

When asked about their willingness to integrate all elements of slow adventure into new nature-based tourism products, Northern Ireland SMEs responded that they are interested in doing so to a higher extent than what they offer today. The SMEs reported that they are especially interested to increase the inclusion of storytelling.

Out of 19 SMEs in the SAINT-Northern Ireland cluster 11 reported that they offer some form of accommodation to their guests, including as follows:

- Hotel (5 SMEs).
- Bed & Breakfast home stay (4 SMEs).
- Wild camping (4 SMEs).
- Rental of cottages / self-catering (4 SMEs).
- Guest house (3 SMEs).
- Youth hostel (2 SMEs).
- Tent camping on the campsite grounds (2 SMEs).
- Farm stay (2 SMEs).
- Glamping (glamorous camping) (1 SME).
- Castle stay (1 SME).

Nine SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various organizations, including the national and local tourism bodies, as well as other third party organizations. In addition, four companies reported that 100% of the ingredients used in their menu were produced locally, and two more companies indicated that 75% of the ingredients used in their menu were produced locally.

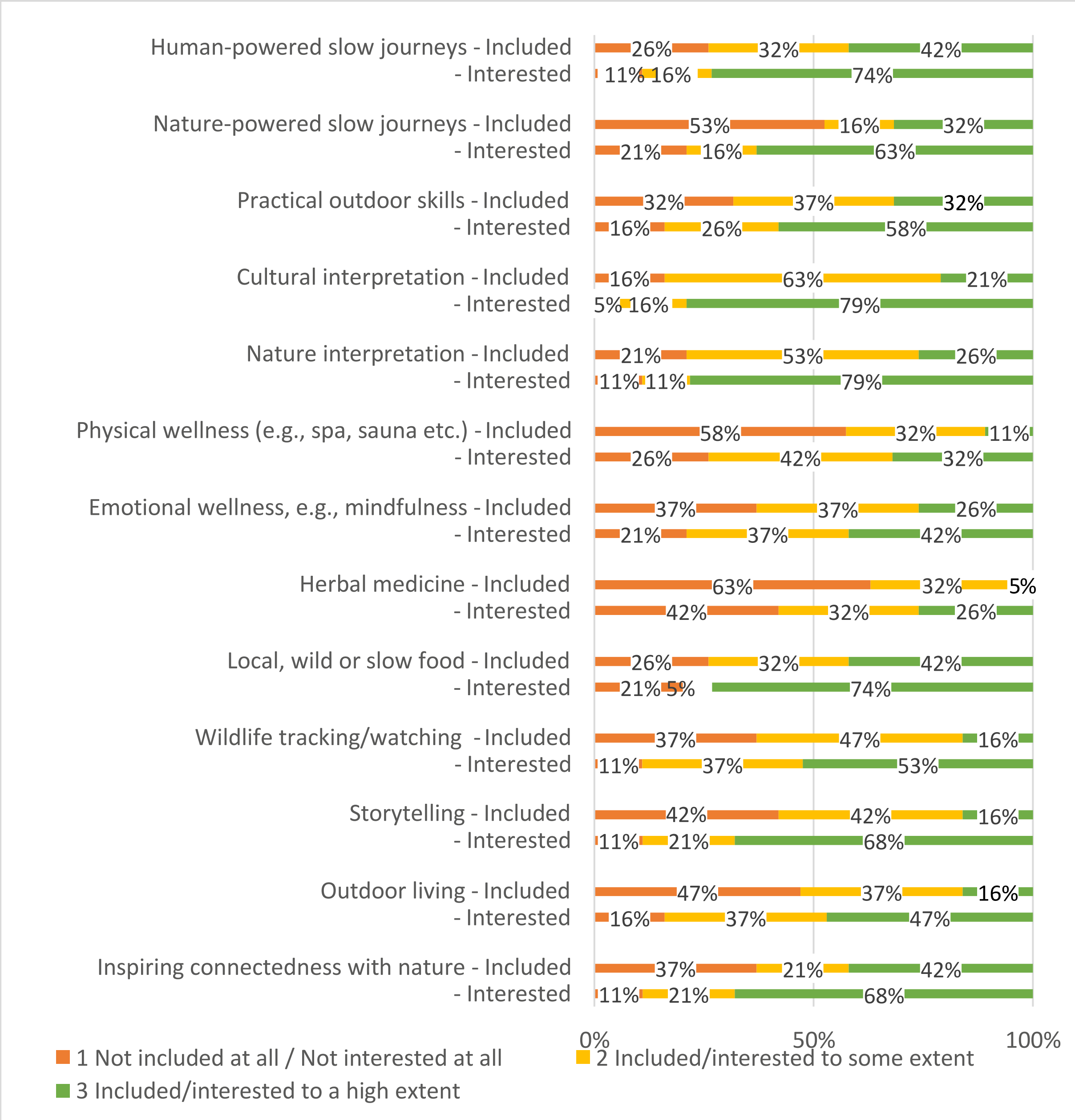


Figure 4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=19)

The survey also included open-ended question about opportunities and threats of the introduction of a new "slow adventure" brand to market nature-based activities in Northern Ireland. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *From competition to cooperation, enhancing collaboration between local SMEs and other stakeholders:*
    - "Lots of opportunities - strength in working together with others, rural location, scenery, waterways available. Strong existing presence of wildlife."
    - "Opportunity to develop a range of programmes collaboratively."
    - "Collective sharing of ideas and shared marketing of the brand Slow Adventure."
    - "Engaging with new businesses and people."
- *Promotion of the local area, increase the exposure of peripherally located micro-sized enterprises especially to new international markets*:
    - "Bring in a new market of tourists from within Ireland and further a field help increase the bed nights within the hotel."
    - "Opportunity to bring tourists out of the city into the sperrins."
    - "Bringing more people to the area. Showing people what our wonderful Estate is all about."
    - "For me the opportunities lie in the resources I now have available in terms of staff and systems. The current business operates on Saturday & Sunday only. There is a great opportunity to target the tourism market April – October."
- *"Slow adventure" as a ready to use product concept*:
    - "I'm not aware of anyone offering the same thing at the moment".
    - "Time spent outdoors has so many benefits".
    - "Huge opportunity in the North West for a strong slow adventure brand as it has not been offered elsewhere in Northern Ireland and thus offers a fantastic unique selling point..."
    - "Increased profile in the market as a place for an alternative experience."
    - " Improving the tourism product in Derry."
    - "I think it will help people to understand adventure is for everyone at there pace."
    - "Provide a one click experience choice that fulfils expectations."

- *Awareness of natural and cultural assets*:
    - "Raising awareness of the need to protect and preserve wild areas for the support they give to species, including humans."
    - "Opportunities for the provision of more detailed interpretation of habitats, landscapes and archaeological sites to clients visiting the North West of Ireland."
    - "Attract attention to the real qualities of the area (North West of Ireland) such as landscape, sincerity of welcome, great local produce, great and eminently sharable cultural heritage, whether living culture such as stories, music and dance, or built heritage."
    - "Raise profile and awareness of what exists in our area."
    - "Great opportunity to show case our area, an area of outstanding natural beauty, which is not tapped into having tourists come and have authentic experiences, tasting locally produced food , slow adventure suits the Sperrin's having low impact on the environment."
    - "Educating those who are not familiar with what rural country Estates do and how they survive."
    - "We want to improve education and get people back in touch with nature."

<u>Threats</u>

Study participants also identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Crowding and carrying capacity*, environmental issues as the possible negative outcome of increasing tourist flows and, consequently, increasing the pressure on fragile and remote areas:
    - "Biggest threat to coastal tourism is pollution and local access to areas of outstanding natural beauty. Decline in our rich biodiversity due to farming or fishing practices. The threat of invasive species on our local landscapes. Lack of enough Government protection for sensitive habitats e.g. Peatlands, machair etc."
- The risk of companies *using the brand only for marketing purposes without actually committing* to the values behind the "slow adventure" concept:
    - "Companies adopting the notion but not promoting it actively just to gain reputation or opportunities."
- *Market capacity*, possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands:

- “Others may try to introduce the same Costs may be prohibitive.”
- “Lack of cooperation or unhealthy competition. Local agendas around resourcing and protecting interests.”
- “Lack of buy in from tour companies, end of funding after NPP project is over.”
- “Conflict of interest with others using the same resource for other activities. eg Kayaking v fly-fishing. Hunting v hill-walking Restricted access eg Gortin Glens restriction on horse-riding by Forestry Commission and mountain bikers.”

- *Lack of tourism infrastructure in the peripheral areas* (transport accessibility):
    - “Ability to access the countryside / greenways / blue ways. Lack of infrastructure.”
    - “Availability of transport and its costs”.
- *Limited capacity of micro-sized businesses to participate in and, therefore, benefit from collaboration*:
    - “Possibility through lack of marketing for it to not really get off the ground.”
    - “Sustainability the project for the future.”
    - “The time required to grow the new adventure may be longer than companies are prepared to wait.”
    - “Dependent very much on the cooperation of other providers working together to create an overall positive experience.”

Case Study Results and Findings

To initiate the slow adventure cluster, the SAINT-Northern Ireland team conducted a wide range of outreach activities including:

- A number of facilitated SME workshops, including:
    - Two initial workshops with regional SMEs to introduce the project, encourage participation, and define the cluster.
    - Three workshops that focused on the development of the cluster in order to create slow adventure itineraries.
- Use of a tourism expert to deliver a series of workshops with one-to-one mentoring to help facilitate the development the slow adventure clusters in the region. Mentoring also included advice to SMEs about how clusters work in terms of the packaging and bundling of services as well as the ways in which consumers are likely to book and pay for such services.
- Best practice visits to Scotland and Leitrim (Ireland) for SMEs from Derry. In addition, a “familiarization” visit for 10 SMEs from Leitrim was organized. This exchange activity

focused on sharing experience about slow adventure packaging for biking, guided canoeing experience, and local cheese production experiences.

- Development of collaborative slow adventure offers, packages, and itineraries.

- Design and print of a 24-page Slow Adventure publication available in print copy, online and via the website.

At the time of this writing, at least 12 collaborative, slow adventure packages have been created. These packages and itineraries are now being actively promoted and sold as part of the SAINT project's pilot testing actions. These slow adventure packages and itineraries have all been copy written as part of the project's pilot testing actions, and customers can book these packages and itineraries directly on the web (http://www.slowadventureni.com/).

A marketing agency has been involved through the tender process with the purpose of development and delivery of a PR & advertising campaign for the Slow Adventure tourism offering in the Derry & Strabane Area. The campaign, which lasted for 9.5 weeks, included a wide range of activities (See Highlight 1: Comprehensive marketing campaign).

In terms of marketing, this cluster hired a professional photographer to develop an image bank of each package to help sell these new slow adventure products. These images have been used throughout the marketing campaign in adverts, promotion material including print, media, press, advertising campaigns, digital media as well as presentations.

Along with the image bank, this cluster retained a company to deliver ten promotional videos to promote the region's slow adventure experiences and related offers.

This cluster also developed a video bank, which can be used as a marketing tool at support promotional campaigns. Through use of a professional videographer, this video library highlights the region's various slow adventure products and packages, which includes all of the 15 SMEs involved in the slow adventure cluster. These videos range from paddle boarding, outdoor cooking, foraging, equestrian treks, and food production tours.

Highlight 1: Comprehensive marketing campaign

In the area of Derry & Strabane, 15 tourism businesses ranging from accommodation providers, activity providers, local food and drink producers and guides all have clustered to develop 13 slow adventure packages. Both guided and unguided experiences include walking, cycling, paddling, canoeing, foraging, local food, landscape and visits to archaeological sites.

To promote these 13 packages, the Derry City and Strabane District Council conducted a marketing campaign with assistance from ORNI to raise awareness of slow adventure as a new tourism concept. The campaign also sought to encourage bookings and targeted specific markets including Northern Ireland, Republic of Ireland and Great Britain.

ORNI conducted the campaign from August to October 2017 and performed a range of marketing activities:

1. *Foundation stage*: This stage included the development of a "Slow Adventure in Northern Ireland" website and logo for Derry-Strabane/Londonberry-Strabane, which was based on the existing Slow Adventure logo. At the preparatory stage, ORNI established the contacts with service providers involved in slow adventure packages, created and uploaded the content describing the 13 packages on the national slow adventure website www.SlowAdventureNI.com, and developed a range of online graphics and photo collages.

2. *Campaign launch*. A press launch event was held on 22nd of August 2017 with the purpose of generating media coverage for kick starting the marketing campaign. As the result of the media coverage in local and national press, £90k have been secured in Equivalent Advertising Value. Similarly, the launch event was covered on a variety of websites.

3. Various forms of *advertising* were executed as part of the campaign. First, advertising in Outdoor Enthusiast magazine, Adventure Travel magazine, Outsider magazine and Delicious magazine included magazine features, magazine adverts, online featured articles (i.e., online advertorial), dedicated e-newsletters and features in e-newsletters, as well as social media posts on Facebook and Instagram. Second, social media advertising included 38 adverts on Facebook reaching 194,183 people in target markets, and 35 adverts placed on Instagram. Finally, the Google AdWords advertising was conducted in September and October 2017 with the purpose of improving the google ranking of the www.SlowAdventureNI.com website within google searches.

   / Social media advertising / Google AdWords Advertising

4. *Online marketing* included the send out of e-Newsletters and online media coverage on the third party websites.

5. *Social media* posts were uploaded on Slow Adventuring Facebook page (30 posts), Instagram account (4 posts) and Twitter page (9 posts), and a range of third parties (e.g., Belfast Live, OutdoorNI, Food NI) posted about slow adventure on their social media platforms.

6. The *PR* campaign included familarization trips for journalists (BBC Radio Ulster, Outdoor Enthusiast magazine, Outsider magazine, The Irish Times magazine) and bloggers (LyndsayMalone.com and the World of Kitsch).

7. A range of *marketing materials* were developed during the marketing campaign, which can be used for future marketing activity. These include a 24-page online brochure showcasing the thirteen slow adventure packages, infographic to inform service providers of the slow

adventure concept and new packages, and an image bank created by photo shooting during the familiarization trips for bloggers and journalists.

8. *Partnerships* have been established with national and regional DMOs. The collaboration resulted in Visit Derry publishing online article, e-newsletter feature and social media posts, Tourism Ireland publishing social media posts, and Tourism Northern Ireland publishing the feature on slow adventure in the e-newsletter, placing the slow adventure competition announcement in the published media, and including the slow adventure packages on the website discovernorthernireland.com.

9. *Campaign results*. The website traffic analysis via Google Analytics showed that www.SlowAdventureNI.com received 3,583 unique visits, 4,564 total sessions and 8,499 total page views during the campaign period. During the campaign period, posts were uploaded to the shared slow adventuring Facebook, Twitter and Instagram pages, reaching 347,072 people and resulting in the 175% growth of Faebook followers, 59% growth of Instagram followers, and 45% growth of Twitter followers. A total of £321k in Equivalent Advertising Value was secured in print media coverage in Northern Ireland, Republic of Ireland and Great Britain as a direct result of the marketing campaign.

Figure 2.4.1. Outsider Magazine Advert

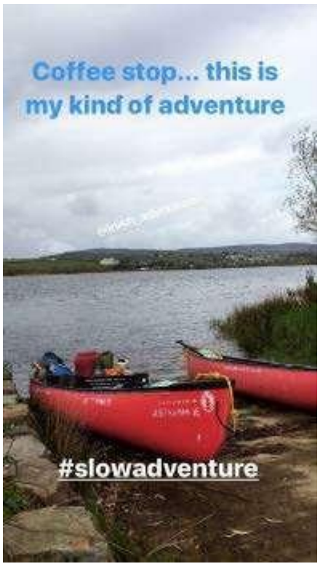


Figure 2.4.2. Outsider magazine Instagram Story

Figure 2.4.3. Facebook advert example

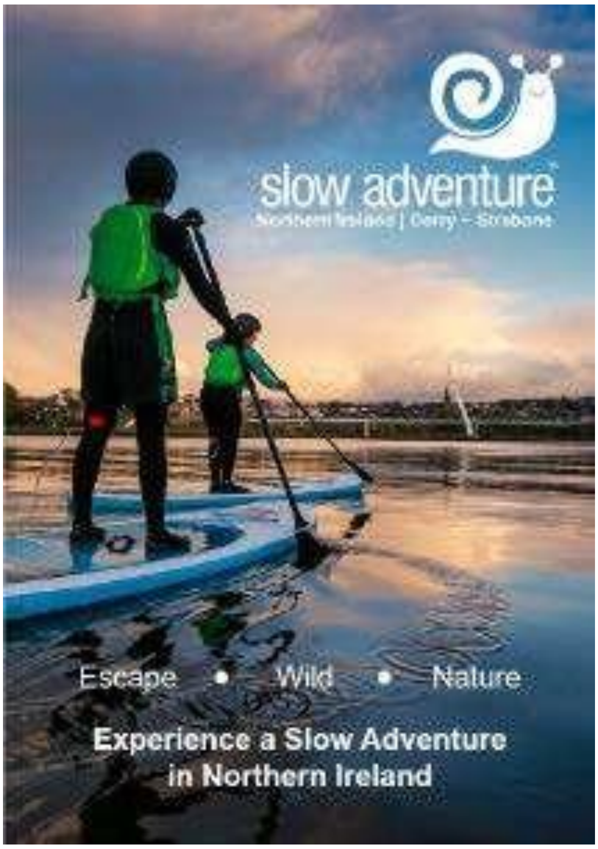


Figure 2.4.4. Online brochure

Source: Slow Adventure Marketing Campaign Report. November 2017 Prepared by Outdoor Recreation NI

2.5. Norway

The SAINT-Norway team developed a case study with three components.

- *Component 1 - Wild Norway Cluster (SMEs clustered by target market)*: This case study focused on understanding the process of slow adventure clustering by target market (see Table 1). This case study relied on qualitative research methods in order to gain in-depth knowledge from the experience of the region's slow adventure SMEs. Through the interview process, the SAINT-Norway team explored why the cluster was established, how it has contributed to the SMEs in terms of reaching new or larger target groups of customers and the different experiences with the collaborative structure. The SAINT-Norway team also explored the personal experiences and motivations for SME participation in order to understand the slow adventure context. This component can reveal potential pitfalls as well as highlight the benefits of being in a cluster.

- *Component 2 – The Coastal Route / Kystriksveien (use of digital marketing)*: The coastal route is a cluster of SMEs along the Norwegian coastline, stretching from the city Steinkjer to Bodø in the geographic middle of Norway. The coastal route is currently packaging a new product related to the concept of "backpacker". The intention is to promote this as a slow adventure product. In this case, the SAINT-Norway team plans to test digital storytelling as a marketing approach for the new package.

- *Component 3 – Cluster approach in Lierne (community clusters – evolving businesses)*: In Lierne, the situation for many agents that sell hunting licenses is challenging, especially when the population of hunting stocks decreases. This raises an important management question as to how SMEs can maintain sufficient income in years when there is little game to hunt and the sales of licenses must be restricted. To help explore new business opportunities, the SAINT-Norway team will introduce slow adventure as a possible concept facilitate clustering, and ultimately new products, amongst these agents.

Survey Results

The SMEs in the SAINT-Norway cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 2.5.1, accommodation, guiding services, as well as education and group events are the business services that respondents rank as most relevant. At the same time, organization of festivals and events, organization of tours, information provision and transportation are the business areas that are less relevant for SMEs from Norway compared to SMEs in the other parts of the SAINT project's transnational cluster.

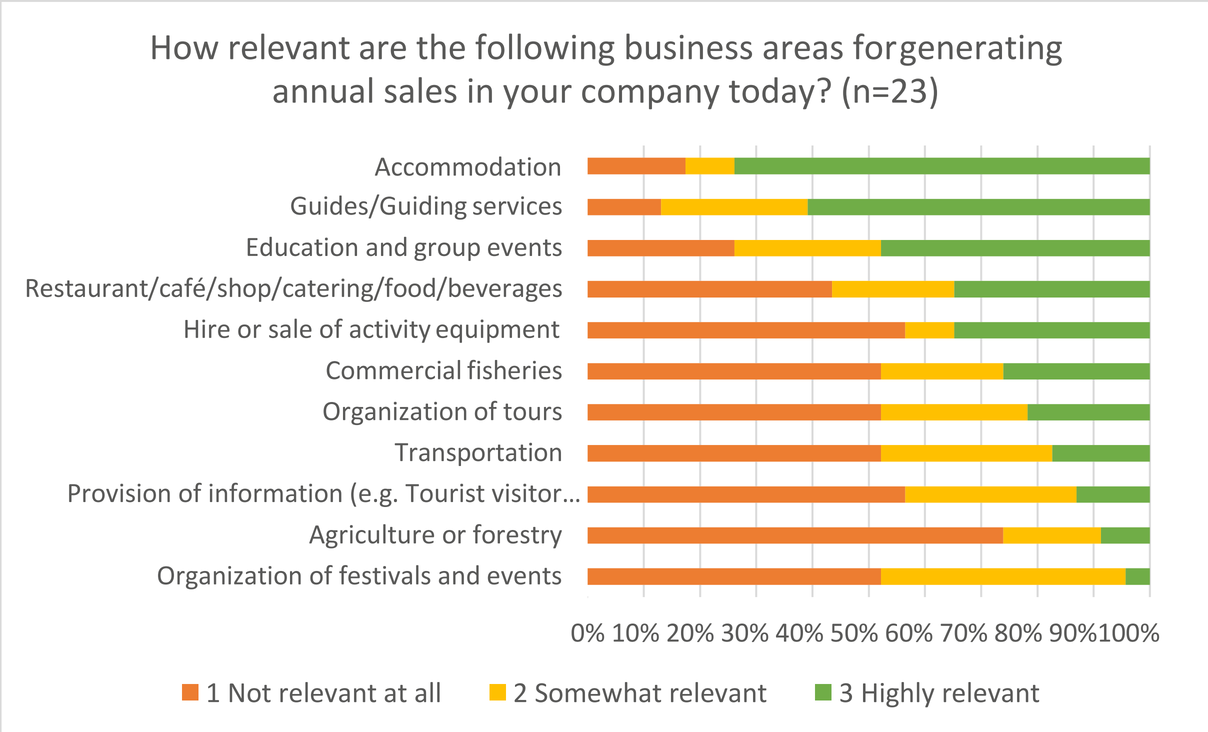


Figure 2.5.1. Relevant business areas

Table 2.5.1 provides information on the number of employees in the SMEs within the SAINT-Norway cluster. Nearly half of SMEs have no full-time employees, while 52% employ 1-3 full time employees. In total, 43% of SMEs indicated that they have one to three employees engaged in nature-based tourism (NBT) activities. Additionally, 13% of SMEs employ seasonal full time employees and 48% employ seasonal part time employees, while the proportion SMEs with full time and part time employees engaged in NBT activities constitutes 13% and 35% respectively.

Table 2.5.1. Number of employees during last 12 months

	Number of employees							
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	48%	26%	26%	0%	0%	0%	0%	100%
Year round part time employees	65%	30%	4%	0%	0%	0%	0%	100%
Seasonal full time employees	87%	4%	4%	4%	0%	0%	0%	100%
Seasonal part time employees	52%	13%	30%	4%	0%	0%	0%	100%
Number of employees engaged in NBT activities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	57%	22%	22%	0%	0%	0%	0%	**100%**
Year round part time employees	78%	17%	4%	0%	0%	0%	0%	**100%**
Seasonal full time employees	87%	9%	4%	0%	0%	0%	0%	**100%**
Seasonal part time employees	65%	9%	22%	4%	0%	0%	0%	**100%**

The SAINT-Norway cluster offers activities all year-around (Figure 2.5.2), as all of the months of the year are highly or somewhat relevant for generating annual sales for a substantial proportion of the SMEs in the cluster. December, however, is an exception, as more than half (52%) of SMEs indicated that this month has no relevance at all for annual sales. The peak season is August, as 87% of SMEs indicated that the month as highly relevant for annual sales generation. Moreover, January and December have a significantly lower relevance to SAINT-Norway SMEs compared to SMEs from other countries in the transnational cluster.

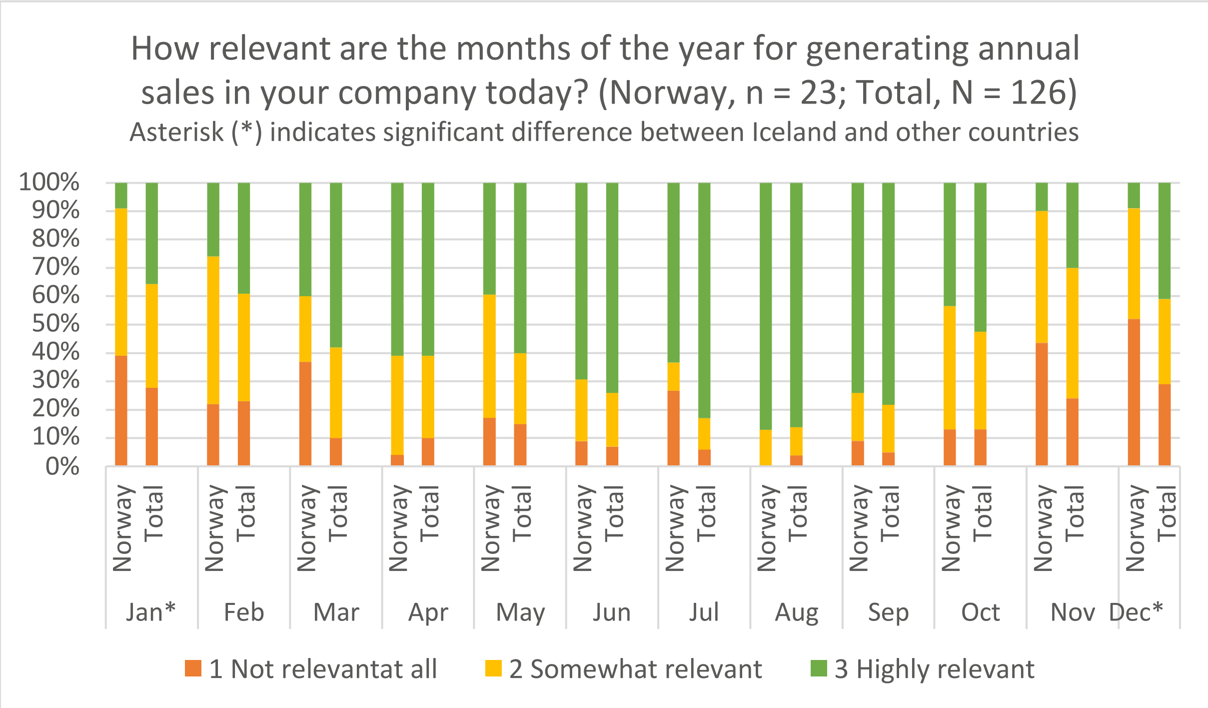
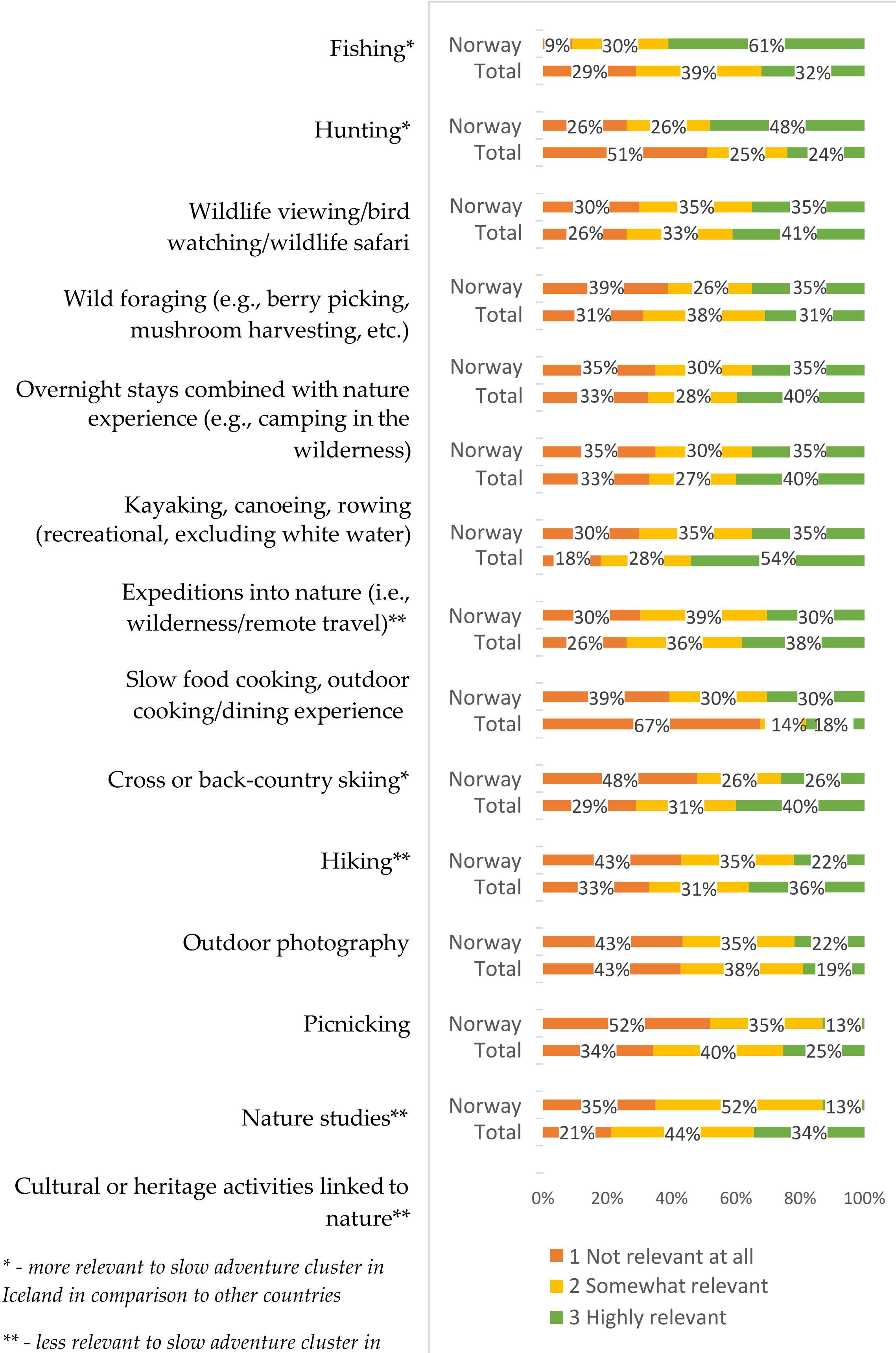


Figure 2.5.2. Seasonality

Figure 2.5.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs representing the SAINT-Norway cluster and/or the transnational slow adventure cluster as a whole. Fishing, hunting and cross-country skiing are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Norway cluster compared to SMEs in other countries. Expeditions into nature, hiking, nature studies and cultural or heritage activities linked to nature, however, are somewhat less important for SMEs in the SAINT- Norway cluster than for SMEs in the other parts of the transnational slow adventure cluster.



** - more relevant to slow adventure cluster in Iceland in comparison to other countries*

*** - less relevant to slow adventure cluster in Iceland in comparison to other countries*

Figure 2.5.3. Relevance of various slow adventure activities for generating annual sales (n=19)

Figure 2.5.4 illustrates the extent to which various elements of slow adventure experience are included into nature-based tourism products currently offered by SMEs in the SAINT-Norway cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 75% of SAINT-Norway SMEs identified that they already include the following elements, either to some extent or to a high extent, in the nature-based tourism products that they offer: outdoor skills, cultural interpretation, nature interpretation, as well as human-powered slow journeys. However, relatively few SAINT-Norway SMEs include either physical and emotional wellness, or wildlife tracking and watching opportunities. Those SMEs that do include these elements do so at a significantly level compared to SMEs in other parts of the transnational slow adventure cluster.

Furthermore, SAINT-Norway SMEs expressed their willingness to include outdoor living, wildlife tracking and watching opportunities, physical wellness and herbal medicine into new nature-based tourism products to a higher extent than what they offer today.

Out of 23 SMEs in the SAINT-Norway cluster, 19 reported that they offer some form of accommodation to their guests:

- Wild camping (8 SMEs).
- Guest house (7 SMEs).
- Rental of cottages / self-catering (7 SMEs).
- Hotel (6 SMEs).
- Bed & Breakfast home stay (5 SMEs).
- Tent camping on the campsite grounds (3 SMEs).
- Caravan camping (2 SMEs).
- Bunk house accommodation (2 SMEs).
- Glamping (glamorous camping) (2 SMEs).
- Farm stay (2 SMEs).
- Youth hostel (1 SME).
- Rental of apartments / self-catering (1 SME).

17 SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various organizations, including the national tourism body, local cooperative groups and Airbnb. In addition, five companies reported that 75% of the ingredients used in their menu were produced locally, and six more companies indicated that 50% of the ingredients used in their menu were produced locally.

Figure 2.5.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=23)

The survey also included open-ended question about opportunities and threats associated with the introduction of a new “slow adventure” brand to market nature-based activities in Norway. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *Promotion of the local area*, increase the exposure of peripherally located micro-sized enterprises especially to new international markets:
    - "I think this may be the spotlight for me and my business, nature is there, it's just getting people to want to buy! Launches the first trip a weekend in April, and let us see how it goes. Truly, there are opportunities here!"
    - "Airport pickup and guiding out to one of our cabins, information in foreign languages German, English French, Dutch I think may be a niche."
    - "Reach a bigger market than just salmon fishermen."
    - "One will receive attention from a customer group (which is probably also growing) and that fits our region (Lierne) well."
    - "Quietness, lots of weather, lodging in the middle of the Eldorado - either in mountain huts, snow caves or tents. For those who wish we are co-owners in the hotel's hotel where you can choose full pension."
    - "New customer groups can discover our product."
- *Increased duration of stay*, targeting customers willing to stay longer and try other, more immersive ways of being in nature:
    - "People calm down, enjoy nature and surroundings, and will probably spend more time on the spot."
    - "One can bring up the good quality of local culture and nature by marketing and targeting tourists who want to spend time in an area to experience, understand and enjoy …"
    - "Package deals, e.g. a whole weekend."

Threats

Study participants also identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Market capacity*, possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands:

- "Market - where is it? Is there a market locally in Trøndelag, in the country, or shall we target central Europe and beyond?"
- "Be visible among all other providers."

- *Misperception of the "slow adventure" concept* by customers and service providers:
  - Only few clearly know what it means.
- *Inadequate transport accessibility* to remote areas.
- *Limited capacity of micro-sized businesses* to participate in marketing activities and develop new products:
  - "Marketing and publishing requires a lot of efforts, and in many cases it is also a expensive."
  - "The biggest challenge in the short term is to have enough time to work out "slow adventure" as a trademark".
  - "Can cost a lot of time and money to introduce."
  - "When it involves more work / engagement, it can be a challenge in terms of time and number of employees. We are a small business with two employees, and our capacity is not limitless (even though we sometimes believe it)!"
- The challenge of targeting tourists with adequate skills and knowledge, or, alternatively, adjusting the product:
  - "Must have different options for people who cannot get far on their own without help (e.g., shorter routes) and those people who are physically strong."
  - "It requires stamina and persistence."
  - "Folks from other countries generally have little knowledge of Norwegian nature and traveling in mountains and forests."

Case Study Results and Findings

The Norway-SAINT team undertook the following activities in order to support the three different components of their case study, as described above:

- Engagement and recruitment of SMEs through an initial workshop in Lierne. A total of 28 participants attended the workshop. This workshop served to initiate the Lierne cluster and allowed the SAINT-Norway team to introduce slow adventure as a potential pathway for new income generation. The workshop focused on understanding how wildlife and forest managers think, while exploring the possibilities for networking and collaborating around new product development associated with the slow adventure concept.

- Cluster development on the coastal route. The SAINT-Norway team engaged a private company to work with municipalities and 180 businesses (mostly accommodation, restaurants and activity providers) along Route 17 (the coastal route) from Steinkjer to Bodø, Mid Norway (a total distance of 650 km).

- Promoted slow adventure through Wild Norway's on-going SME partner network, including their position in the Trondelag Tourism Marketing Advisory Board (the region of central Norway) as well as at other high visibility events such as the World Nomads Travel Insurance Company campaign and the Duke of Edinburg Award charity event.

- The SAINT-Norway team produced a digital story for a slow adventure biking concept, which was a new product for the coastal route cluster.

Through the activities described above, the slow adventure concept was used to add value and help promote the tourism offers in the three components included in the case study.

Highlight 1: Slow Adventure Packages

One highlight from the SAINT-Norway cluster was the use of the the slow adventure brand to promote packages in association with Wild Norway. These packages are rooted in closeness to nature and exemplify many of the core elements of slow adventure as captured in the SME survey. Figure 2.5.5 offers a screen capture of how some of these new slow adventure products are marketed.

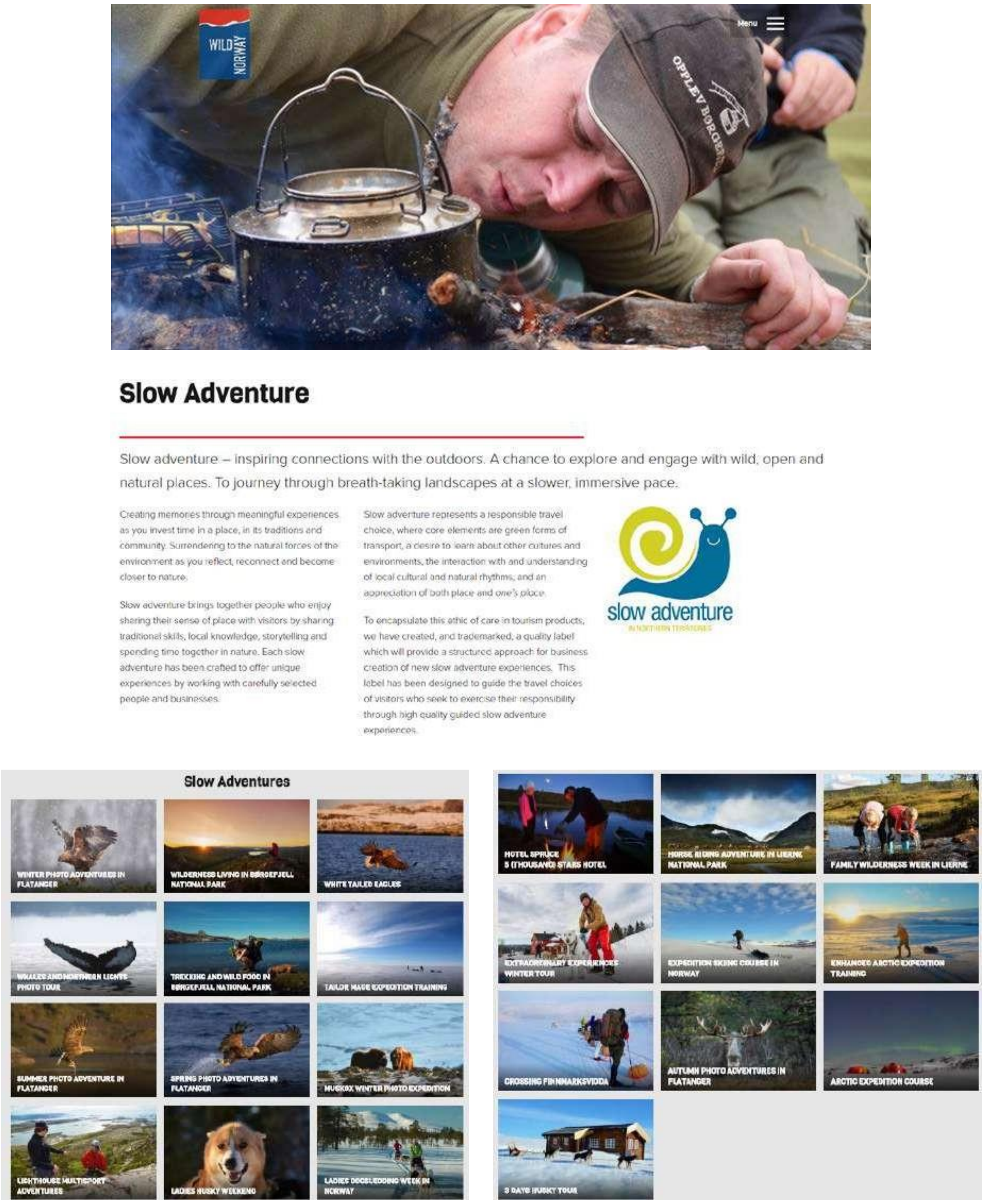


Figure 2.5.5. Slow Adventure Packages on the Wild Norway website.

2.6. Scotland

This case study's overall goal was to facilitate collaboration among tourism providers (slow adventure SMEs) as well as between these providers and various tourism marketing groups. Such collaboration is essential for promoting the region as a premier 'slow adventure' destination for the new markets that were identified in WP3 (data gathering and applied market research).

This case study thus emphasized several of the marketing elements described in Table 1, while also drawing from clustering perspectives in order to encourage regional marketing activities.

It is important to note that the regional marketing landscape has shifted recently, as politics have meant that various local DMGs, such as the Road to the Isles (RTTI) and Ardnamurchan Tourism Association (ATA), have decided to split from the existing regional destination management organization (DMO) Outdoor Capital of the United Kingdom (OCUK) to establish their own DMO, WHIMG.

In response to the evolving regional DMO landscape, the SAINT-Scotland team will undertake the following key activities to achieve the goal of this case study:

1. Create a database of slow adventure relevant SMEs in the RTTI and Ardnamurchan areas. This database will focus on SMEs that (a) currently deliver slow adventure activities, (b) show potential for moving into this market space easily, and (c) offer associated services that could be included with future slow adventure packages or clusters, such as accommodation and/or food providers. Once identified, work with SMEs to communicate core values of 'slow adventure'.

2. Work with ATA and RTTI to conduct targeted research of its members and review current marketing material to inform subsequent marketing activity.

3. Work with RTTI and ATA to communicate and use findings in WP3 to create marketing messages and written content for the promotion of slow adventure to specific target markets.

4. Investigate with RTTI and ATA the clustering of slow adventure-relevant SMEs and the packaging of slow adventure experiences through the creation of 'suggested itineraries' for key target markets (film/photo-montage to demonstrate 'package').

5. Share evidence of growing interest in slow adventure sector with OCUK and encourage the group to include slow adventure/nature-based tourism as a key campaign in its new marketing strategy, in particular to a specific target market.

6. Share evidence of growing interest in slow adventure sector with OCUK and encourage the group to include slow adventure/nature-based tourism as a key message on its new website.

7. Encourage VisitScotland to embrace and promote and region as a premier place for slow adventure in national and international campaigns as a result of working with RTTI/ATA and OCUK.

8. Based on the findings in WP5, support LCOC and the digital marketing workshop organisers by actively encouraging the pilot study SMEs to attend the workshops.

Survey Results

The SMEs in the SAINT-Scotland cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. As demonstrated in Figure 2.6.1, accommodation, guiding services and information provision are the business services that respondents rank as most relevant (or important), while commercial fishing is somewhat relevant to just a few SMEs. Moreover, commercial fishing is less relevant for SAINT-Scotland SMEs compared to SMEs in the other parts of the SAINT project's transnational cluster.

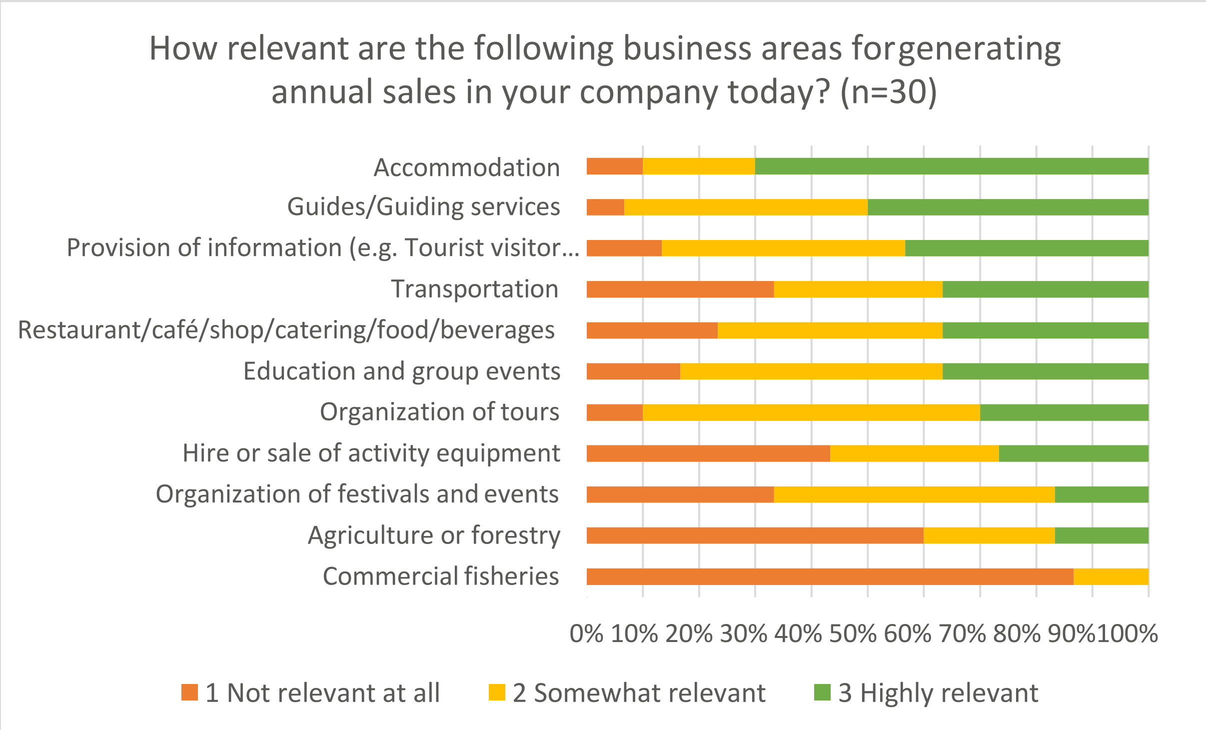


Figure 2.6.1. Relevant business areas

Table 2.6.1 provides information on the number of employees in the SMEs within the SAINT-Scotland adventure cluster. One third of SMEs have no full-time employees, 63% employ 1-5 full time employees, and one SME reports the company employed more than 20 full time employees. In total, 47% of SMEs indicate that they have one to three employees engaged in nature-based tourism (NBT) activities. Additionally, 30% of SMEs employ seasonal full time employees and 40% employ seasonal part time employees, while the proportion SMEs with full time and part time employees engaged in NBT activities constitutes 13% and 10% respectively.

Table 2.6.1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	33%	30%	23%	10%	0%	0%	3%	100%
Year round part time employees	70%	7%	13%	7%	3%	0%	0%	100%
Seasonal full time employees	70%	7%	10%	7%	0%	7%	0%	100%
Seasonal part time employees	60%	17%	20%	0%	3%	0%	0%	100%
Number of employees engaged in NBT actitivities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	53%	30%	17%	0%	0%	0%	0%	**100%**
Year round part time employees	80%	10%	10%	0%	0%	0%	0%	**100%**
Seasonal full time employees	87%	7%	3%	3%	0%	0%	0%	**100%**
Seasonal part time employees	90%	0%	10%	0%	0%	0%	0%	**100%**

The SAINT-Scotland cluster offers activities all year-around (Figure 2.6.2), as all of the months of the year are highly or somewhat relevant for generating annual sales to a substantial proportion of the SMEs in the cluster. The peak season is from May to August. May, June and October have a significantly higher relevance to SAINT-Scotland SMEs compared to SMEs from other countries in the transnational cluster.

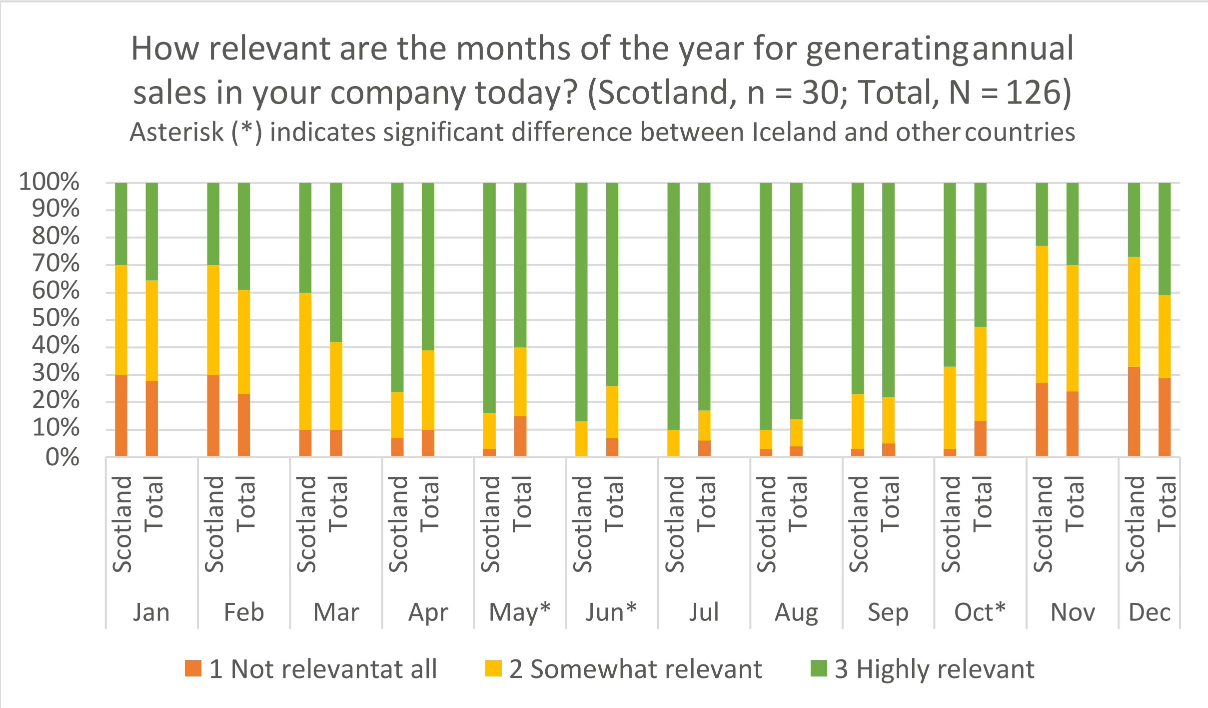


Figure 2.6.2. Seasonality

Figure 2.6.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs that represent the SAINT-Scotland cluster and/or the transnational slow adventure cluster as a whole. Sightseeing by boat, cruising and sea rafting, as well as swimming in lake/sea are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Scotland cluster compared to SMEs in other countries.

Expeditions into nature, wildlife viewing and bird watching, overnight stays combined with nature experience, nature studies and outdoor photography are the most important activities (i.e., activities of highest relevance) high relevance for the transnational slow adventure cluster as a whole. Yet, their importance is significantly higher for sales generation for SAINT-Scotland SMEs compared to slow adventure SMEs in other countries. Additionally, recreational kayaking, canoeing and rowing, hiking, slow food cooking and outdoor dining, wild foraging, cultural or heritage activities linked to nature, food tours well as fishing are relevant to a substantial proportion of SAINT-Scotland slow adventure SMEs. These activities are also highly relevant to SMEs in other countries and constitute the core part of the slow adventure experience offer of the transnational cluster.

Figure 2.6.3. Relevance of various slow adventure activities for generating annual sales (n=30)

Figure 2.6.4 illustrates the extent to which various elements of the slow adventure experience are included into nature-based tourism products currently offered by SMEs in the SAINT-Scotland cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 80% of SAINT-Scotland SMEs already include the following elements, either to some extent or to a high extent, in the nature-based tourism products that they offer: nature interpretation, cultural interpretation, wildlife tracking/watching opportunities, human-powered slow journeys, as well as local, wild or slow food. SAINT-Scotland SMEs include nature interpretation and wildlife watching to a significantly higher extent compared with SMEs in other countries, while physical wellness and nature-powered slow journeys are significantly less represented in Scotland than in other parts of the transnational slow adventure cluster.

When asked about their willingness to include all elements of slow adventure into new nature-based tourism products, SAINT-Scotland SMEs responded that they are interested in doing so to a higher extent than what they offer today. While 17% of SMEs include physical wellness in the NBT products that they currently offer, 60% of SMEs reported that they are interested in including this element into new NBT products that they might offer in the future. This is the largest increase in any of the 13 elements. Likewise, 37% of SMEs reported that they include nature-powered slow journeys in their offer, while 77% of SMEs indicated that they would be interested in doing so in the future. In addition, 30% of SMEs reported that they include herbal medicine in their offer, while 67% of SMEs indicated that they would be interested in doing so in the future. This is the second and the third largest increase in any of the 13 elements.

Out of 30 SMEs in the SAINT-Scotland cluster 21, reported that they offer some form of accommodation to their guests:

- Wild camping (13 SMEs, 43%).
- Hotel (9 SMEs, 30%).
- Tent camping on the campsite grounds (9 SMEs, 30%).
- Rental of cottages (8 SMEs).
- Bunk house accommodation (7 SMEs).
- Bed & Breakfast home stay (6 SMEs).
- Guest house (6 SMEs).
- Glamping (6 SMEs).
- Caravan camping (5 SMEs).
- Rental of apartments (4 SMEs).
- Youth hostel (3 SMEs).
- Castle stay (2 SMEs).

- Farm stay (1 SME).

19 SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various organizations, including the national and local tourism bodies, local co-operative groups, Airbnb and other third party organizations. In addition, one company reported that 100% of the ingredients used in their menu were produced locally, and five more companies indicated that 75% of the ingredients used in their menu were produced locally.

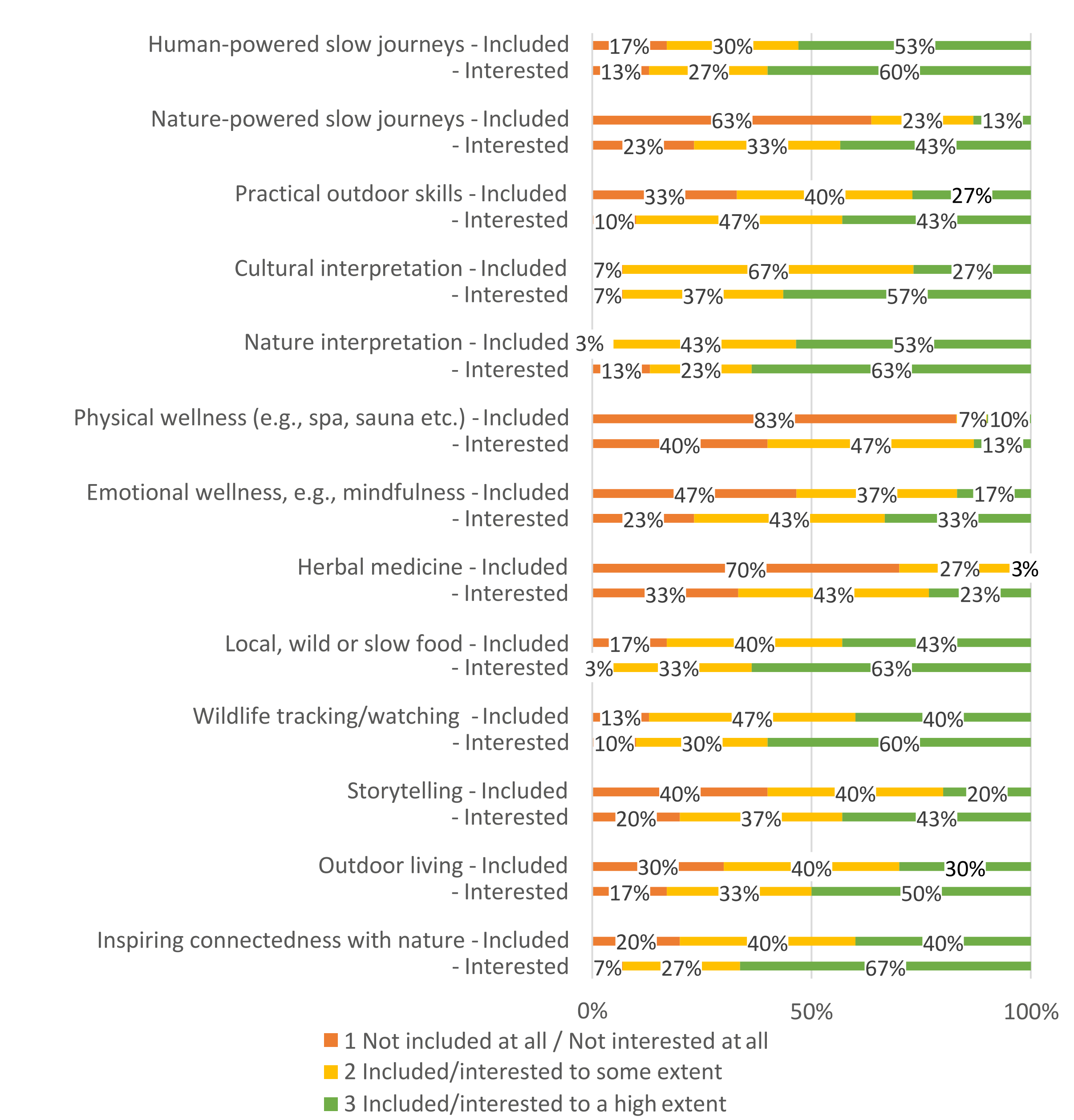


Figure 2.6.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=30)

The survey also included open-ended question about opportunities and threats of the introduction of a new "slow adventure" brand to market nature-based activities in Scotland. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *From competition to cooperation, enhancing collaboration between local SMEs and other stakeholders*:
    - Linking with a network of like-minded and high quality providers."
    - "Maintaining effective communication with other businesses and coordinating efforts at creating slow adventures."
    - "Businesses working together."
    - "Awareness of the vital importance of cluster groups moving forward as one and promoting tourism in the local area."
    - "Opportunities for collaboration with other local organizations/businesses."
    - "Working together with other local businesses will benefit everyone (tourist, local business and ourselves)."
- *Promotion of the local area, increase the exposure of peripherally located micro-sized enterprises especially to new international markets*:
    - "Associating remote areas with a high quality experience."
    - " Attracting more adventurous and/or affluent visitors."
    - " Different client base who are interested more in the journey rather than the adventure."
    - " New client type."
    - " Opportunities to open out to a wider audience."
    - " To develop relationships and get repeat visitors."
    - "A way of understanding the uniqueness and engagement our visitors have with this remote part of the world. A brand/ethos that can sum up this connectivity with nature."
    - "Attracting a new client base from outside the area."
    - "Greater promotion internationally."

- ”It is a great chance to work with other businesses and encourage people to stay in the area longer.”

- ”It's a better way to promote a way of visiting the outdoors and traveling in the wilderness.”

- ”Landscape, large amounts of wilderness.”

- ”Our landscape and position is ideal. People come here for the peace and quiet and to enjoy nature. This would seek to enhance our tourism offerings.”

- ”We would hope it would lead to a wider reach in terms of customers. Give an alternative offering to tourists.”

- *Participation in joint online marketing and social media campaigns*:

  - “Getting benefits of joint marketing especially social media presence that I am not currently engaging with.”

  - ” Increased exposure through shared marketing opportunities.”

- *Increased duration of stay, targeting customers willing to stay longer and try other, more immersive ways of being in nature*:

  - “To get a higher engagement and spend per visitor.”

  - ” To get visitors to stay longer.”

  - ”Ability to build a focus away from adrenaline activities. Therefore creating inclusivity for all.”

  - ”More connection with nature and natural ways.”

  - ”The ability to make immersion in the wild and beautiful natural landscape the area has to offer available to those without technical skill in outdoor adventure.”

- *Year round business potential, extending the tourism season*:

  - “More revenue.”

  - ”All year round occupancy, activity and employment.”

  - ”Opportunities to extend the season.”

- *“Slow adventure” as a ready to use product concept*:

  - “Aligning yourself with a concept and a brand that the consumer will recognize with a specific type of experience.”

- *Awareness of natural and cultural assets*:
    - "Raised awareness of area and what it has to offer."
    - "Raise awareness of our offering and that of those working in a similar way."
    - "Working with other local experts and providers to offer an experience that allows clients to really get to experience and understand the area they are in - food, culture, history, flora & fauna - as well as learn about and celebrate their self and their abilities."

<u>Threats</u>

Study participants also identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Crowding and carrying capacity*, environmental issues as the possible negative outcome of increasing tourist flows and, consequently, increasing the pressure on fragile and remote areas:
    - "The main threat I can see is environmental. Slow tourism plus adventure tourism will have more impact on the places we use. If visitors increase so does the pressure on these fragile places. More money needs to come from the tourism industry to help with conservation and infrastructure."
- The risk of companies *using the brand only for marketing purposes without actually committing* to the values behind the "slow adventure" concept:
    - "Maintaining quality associated with the slow adventure branding when so many diverse companies may be using it."
    - "Saturation of non-committed businesses."
    - "Dilution of the benefits if the brand's integrity is not maintained."
    - "That activities are not locally linked or relevant - not always a necessity but it is nice to have a back story of why this activity is being provided in a specific area."
    - "That activities are not quality based."
- *Market capacity*, possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands:
    - "Competing with a lot of other branding schemes."
    - "Competing with existing products in height of season."
    - "Cooperation with other providers in the area being seen as a threat to their own businesses."

- “Increased competition in a small market (though this could be outweighed by the benefits and could also increase the size of the market drawn to the area).”

- “Insular businesses only interested in their own profits.”

- *Misperception of the "slow adventure" concept by customers and service providers*.

- “Not many people understand what a slow adventure is.”

- “Perception of the words slow adventure. It’s really a mindset you’re changing.”

- *Lack of tourism infrastructure in the peripheral areas* (transport accessibility, accommodation):

  - “Remoteness of location.”

  - “Lack of accommodation in the area.”

  - “Lack of infrastructure?”

- *Legislation and regulations*:

  - “Package holiday regulations making it harder to offer an easy payment option to the client.”

- *Limited capacity of micro-sized businesses to participate in and, therefore, benefit from collaboration*:

  - “Will be hard work to organize coordinated and joined up adventures that are made "easy" and accessible to clients.”

  - “Will it generate more admin time, (currently at full capacity as sole trader) without bearing more fruit, i.e. risk of courses falling through due to low numbers after having done loads of preparation and admin.”

Case Study Results and Findings

To initiate their cluster, the SAINT-Scotland team conducted the following activities:

- Establishment of a database of slow adventure related SMEs in the region.

- Delivery of a number of “initiation” workshops, including:

  - *Consumer research and clustering workshop*: This workshop engaged the region’s SME’s to communicate findings from WP3 develop ideas for initiating the slow adventure cluster. The workshop was held in Glenfinnan and focused on collaboration between businesses in the area. The workshop also included discussions on promoting slow adventure to new consumers.

  - *Slow adventure clustering workshops*: The SAINT-Scotland team hosted two additional clustering workshops with slow adventure SMEs on collaborating, packaging and insurance issues. These workshops were peer-to-peer events and included sessions on digital marketing skills. These activities directly helped to promote slow adventure because the SME's that participated in the workshops contributed to the digital marketing campaign. For example, two slow adventure "viral videos" were produced together with the local DMO (Outdoor Capital of the UK's VisitScotland Growth Fund). These slow adventure packages are now marketed on regional tourism websites such as ATA, RTTI, and OCUK. Another example were the blog trips that SMEs hosted for the Let's Go Slow team. The Let's Go Slow team also provided an interactive session on how to create, edit and publish video content. [3]

- Participation in over 20 different meetings and workshops with various slow adventure stakeholders and actors to energize and activate the cluster. These included meetings with (i) local destination marketing/management organizations regarding WP4 outputs, (ii) Wild Scotland on regional and national cluster development, (iii) the Scottish Tourism Alliance and other key stakeholders to develop ideas on the regional and national remit for slow adventure, and (iv) visits with individual SMEs to encourage their participation in the slow adventure cluster.

- Study visits to examine how newly created slow adventure packages were developing on the west coast of Scotland. Study visits included participants from the University of the Highlands and Islands, Derry City and Strabane District Council (Northern Ireland) and Leitrim County Council (Republic of Ireland). In addition, a wide range of SMEs participated including Derry Equestrian, Butterlope Farm, Beech Hill, Landscape & Countryside Guiding, Bradkeel Social Farm, Finn Valley Cottages, Inish Adventures, Wild Strands, Walled City Brewery, Tamnagh Foods and Far & Wild, Cycle Trails, Old Rectory, Adventure Gently, Jo Suppers and Yoga, Leitrim Craft and Design, Way to Go, Organic Centre, Leitrim Surf, and The Food Hub. During the study visits, a number of the new slow adventure packages were discussed, such as:

    - *Sailing, wild yoga and wellbeing on the Rhu Peninsula, Arisaig* - a collaboration between Selkie Explorers, Yogasticks, and Laig Bay Brewery.

    - *The Last Wilderness on Knoydart* - a wilderness skills and fishing adventure with Minch Adventures, Wildwood Bushcraft and Knoydart Pottery and Tearoom.

    - *Wildlife Watching and Sea Kayaking Day* – a collaboration between Wild West Safari, Arisaig Sea Kayak Centre and Glenuig Inn.

- The SAINT-Scotland team created social media guidelines for SMEs in order to communicate coordinated messages to SMEs, DMOs, and other key stakeholders. These guidelines were eventually approved and adopted by SAINT project partners.

The SAINT-Scotland team also conducted a wide range of marketing activities in order to support the development of their slow adventure cluster while advancing the slow adventure business concept within the context of the project. These marketing activities included:

[3] More information about the Let's GO Slow blog effort is available here: http://saintproject.eu/transnational-marketing-campaign-and-the-saint-projects-collaboration-with-lets-go-slow/.

- Development of the slow adventure logo, which was trademarked in the UK. The logo is now widely used by all project partners. Development of the logo is a key outcome of the project and part of the long-term legacy of the SAINT effort.

- Collaboration with SMEs to develop the regional slow adventure social media campaign.

- Participation in the VisitScotland annual EXPO (2017), which served as a catalyst for the developing slow adventure packages as well as creation of a high quality promotional brochure. The brochure was displayed at Visit Scotland Expo (in Glasgow), which details the seven products developed by a cluster of 37 businesses. It is important to note that the SAINT-Scotland team won two awards at the EXPO: (i) 'Best New Exhibitor' and (ii) 'Most Effective Personnel'. Participation in the EXPO also led to the establishment of a Slow Adventure Cooperative, which is a not-for-profit spin-off social enterprise that will market slow adventure experiences. Along with the logo, the Slow Adventure Cooperative is a key outcome of SAINT and part of the project's long-term legacy.

- Collaboration with the DMO OCUK on the production of two viral videos of slow adventure experiences.

- Development of the www.slowadventure.scot website, which promotes slow adventure and a range of slow adventure packages.

- Collaboration with Let's Go Slow bloggers and the initiation of two pilot blog trips, one on Eigg and the other on Canna. These initial blog trips led to similar efforts in the other partner countries with the Let's Go Slow bloggers, and the blogging activity became an important part of promoting slow adventure.

- Collaboration with RTTI and ATA to put slow adventure pages on their websites.

Through these clustering and marketing activities, the SAINT-Scotland helped to facilitate a growing number of slow adventure packages that are currently on the market. At the time of this writing, there are 11 different types of packages, each of which require an effective slow adventure cluster to deliver the product.

Insert SAINT-Scotland feature: (i) brochure, (ii) expo, (iii) slow adventure cooperative

Highlight 1: Brochure

The Scottish case study focused on clustering SMEs and working with DMOs to create and promote the slow adventure experiences (or packages). 37 SMEs collaborated to create 7 thematic slow adventures within two specific geographical regions – the Ardnamurchan peninsula and the Road to the Isles and therefore UHI produced a promotional brochure which included each slow adventure developed. This brochure was then turned into a web version and remains so on www.slowadventure.scot.

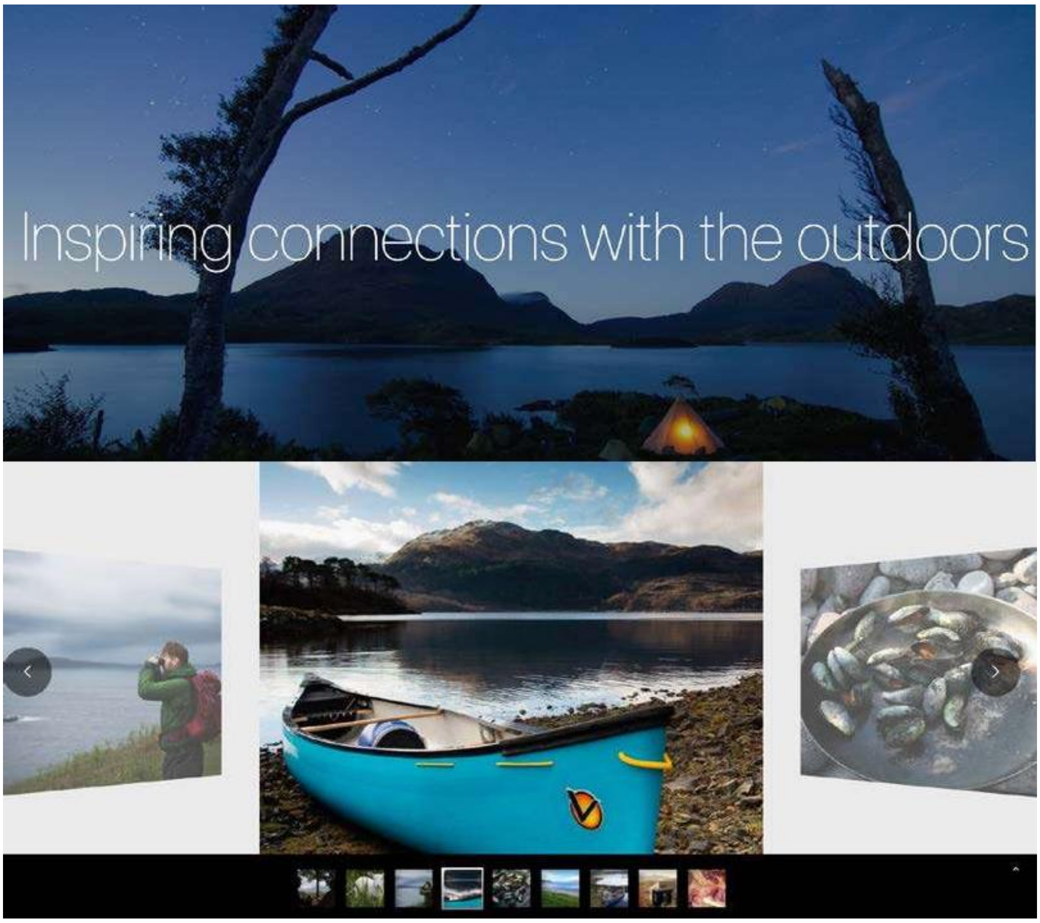


Figure 2.6.5. Online brochure on www.slowadventure.scot

Highlight 2: VisitScotland Expo

Having developed the brochure as part of the marketing efforts for the case study, UHI took the opportunity to hold an exhibitor stand at VisitScotland Expo 2017 – the largest tourism trade show in Scotland - to test the concept and Scottish slow adventure products with international tour operators and buyers. The response was extremely encouraging and the team which included UHI staff and SMEs won an award for Best New Exhibitor and Most Effective Personnel. Slow Adventure® returned to VisitScotland Expo in 2018.

Highlight 3: Slow Adventure Co-operative

Following the positive response at VisitScotland Expo UHI and some key SMEs involved in the Scottish case study established a not-for-profit co-operative company so that slow adventure products in Scotland could be developed and promoted beyond the SAINT project. It was also established as a way to sell these packaged products easily and responsibly (taking account of the EU regulations on packaged tourism products) both to tour operators and direct to the consumer. Tour Operator insurances are still being sought before the company starts trading.

2.7. Sweden

The SAINT-Sweden case study focused on the clustering and marketing processes of one SME – and its existing network of partners and business collaborators – in the project area. This approach allowed the SAINT-Sweden case study to better understand the viability of introducing the slow adventure concept to the region, while observing the process unfold through the experience of a single SME and its network as it enters the slow adventure market space.

The SME at the center the SAINT-Sweden case study is a typical micro-sized, nature-based tourism activity provider in the region of Jämtland, Sweden. The business combines hunting and outdoor activities with the themes of health and wellbeing by organizing unique hunting experiences that combine health and wellbeing with the excitement of the hunt. It should also be noted that the business is owned and operated by a woman, and targets women as its primary clientele.

Survey Results

The SMEs in the SAINT-Sweden cluster represent all of the different types of business services that are potentially relevant for the slow adventure context. However, it is important to note that the SAINT-Sweden slow adventure cluster has a "hunt and health" profile. As a result, the cluster includes several stakeholders that are not SMEs. One example are landowners that lease their property for use as hunting grounds. As demonstrated in Figure 2.7.1, guiding services and accommodation are the business services that respondents rank as most relevant. Commercial fishery as a business area is more relevant to the SAINT-Sweden cluster compared to the other parts of the SAINT project's transnational cluster, while organization of tours, information provision and transportation are less relevant.

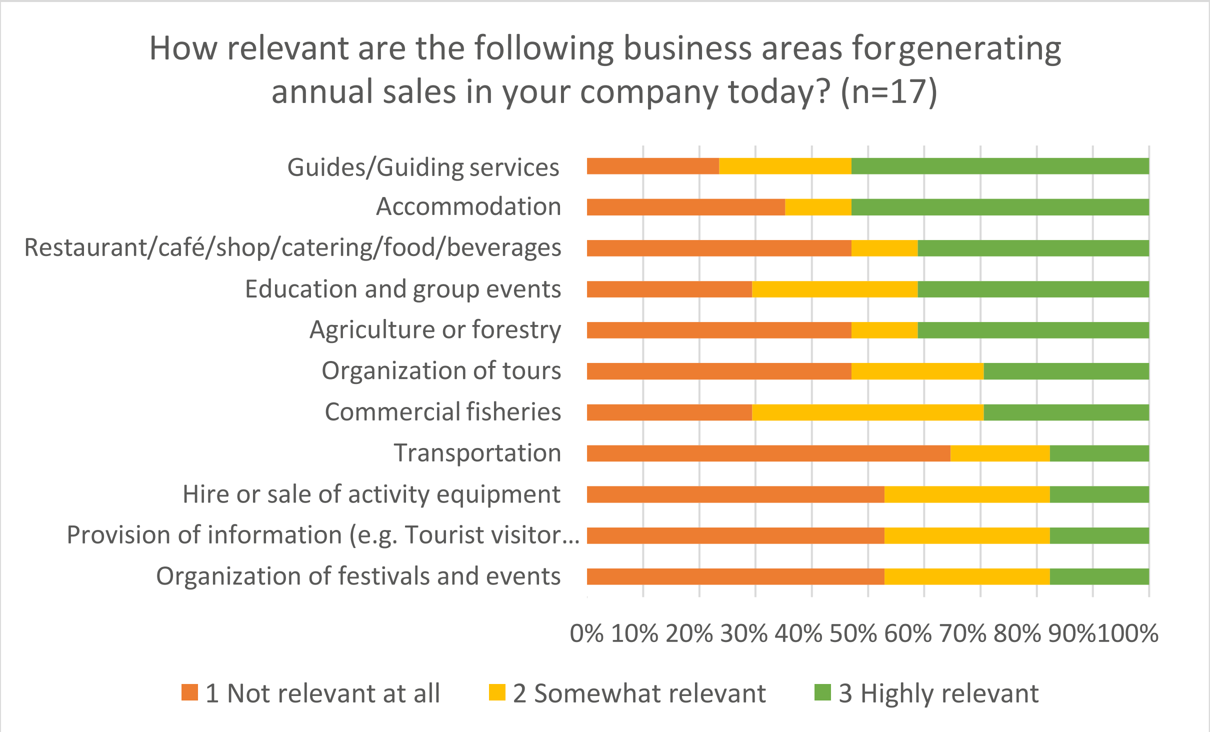


Figure 2.7.1. Relevant business areas

Table 2.7.1 provides information on the number of employees in the SMEs and other relevant stakeholders within the SAINT-Sweden cluster. Nearly half of SMEs have no full-time employees, while 41% employ 1-10 full time employees, and two more stakeholders employ more than 10 full-time employees. In total, 35% of SMEs and stakeholders indicated that they have full-time employees engaged in nature-based tourism (NBT) activities. Additionally, 29% of SMEs and stakeholders employ seasonal full time employees and 53% employ seasonal part time employees, while the proportion SMEs and stakeholders with full time and part time employees engaged in NBT activities constitutes 24% and 35% respectively.

Table 2.7.1. Number of employees during last 12 months

Number of employees								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	47%	24%	12%	0%	6%	6%	6%	100%
Year round part time employees	59%	18%	18%	0%	0%	0%	6%	100%
Seasonal full time employees	71%	6%	12%	0%	6%	0%	6%	100%
Seasonal part time employees	47%	24%	12%	6%	0%	6%	6%	100%
Number of employees engaged in NBT actitivities								
	0	**1**	**2-3**	**4-5**	**6-10**	**11-20**	**More than 20**	**Total**
Year round full time employees	65%	18%	6%	6%	0%	0%	6%	**100%**
Year round part time employees	65%	29%	0%	0%	0%	0%	6%	**100%**
Seasonal full time employees	76%	12%	6%	0%	0%	0%	6%	**100%**
Seasonal part time employees	65%	24%	6%	0%	0%	0%	6%	**100%**

The SAINT-Sweden cluster offers activities all year-around (Figure 2), as all of the months of the year are highly or somewhat relevant for generating annual sales for a substantial proportion of the SMEs in the cluster. The peak season is in August and September, as 88% of SMEs and stakeholders indicated that the month is highly relevant for annual sales generation. At the same time, May, June and July have a significantly lower relevance to SAINT-Sweden SMEs compared to SMEs from other countries in the transnational cluster.

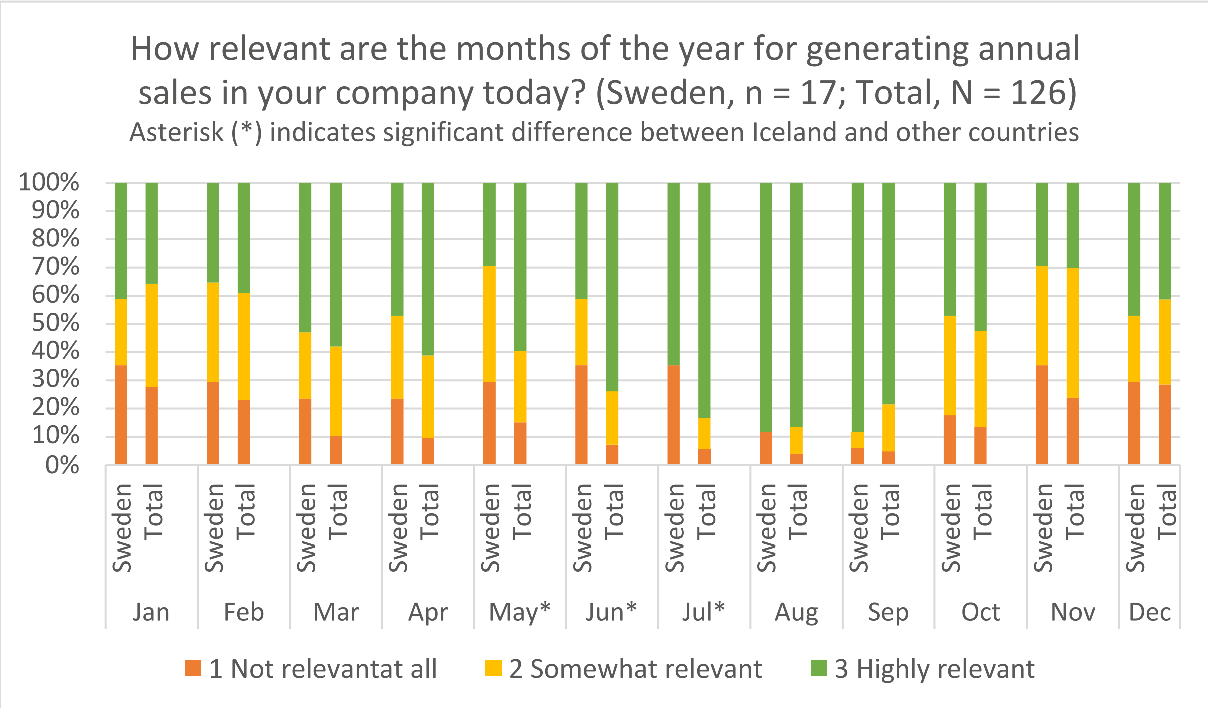


Figure 2.7.2. Seasonality

Figure 2.7.3 shows the relevance of various slow adventure activities, which are highly or somewhat important to at least half of SMEs and other stakeholders representing the SAINT-Sweden cluster and/or the transnational slow adventure cluster as a whole. Hunting, reindeer farm programs and dogsledding are significantly more important (i.e., relevant for annual sales generation) for SMEs in the SAINT-Sweden cluster compared to SMEs in other countries. Cultural and heritage activities linked to nature, outdoor photography and nature studies, however, are somewhat less important for SMEs in the SAINT- Sweden cluster than for SMEs in the other parts of the transnational slow adventure cluster.

Hunting*	Sweden	0%	35%	65%
	Total	51%	25%	24%
Slow food cooking, outdoor cooking/dining experience	Sweden	35%	12%	53%
	Total	26%	36%	38%
Expeditions into nature (i.e., wilderness/remote travel)	Sweden	24%	29%	47%
	Total	18%	28%	54%
Hiking	Sweden	41%	18%	41%
	Total	29%	31%	40%
Fishing	Sweden	12%	47%	41%
	Total	29%	39%	32%
Cross or back-country skiing	Sweden	47%	12%	41%
	Total	67%	14%	18%
Wildlife viewing/bird watching/wildlife safari	Sweden	35%	29%	35%
	Total	26%	33%	41%
	Sweden	35%	29%	35%
	Total	33%	28%	40%
Overnight stays combined with nature experience	Sweden	53%	12%	35%
	Total	33%	27%	40%
Kayaking, canoeing, rowing (recreational, excluding white water)	Sweden	47%	24%	29%
	Total	78%	10%	12%
Reindeer farm programs*	Sweden	53%	18%	29%
	Total	43%	38%	19%
Picnicking	Sweden	71%	6%	24%
	Total	41%	37%	21%
Food tours	Sweden	41%	41%	18%
	Total	31%	38%	31%
Wild foraging (e.g., berry picking, mushroom harvesting, etc.)	Sweden	41%	41%	18%
	Total	21%	44%	34%
Cultural or heritage activities linked to nature**	Sweden	47%	41%	12%
	Total	77%	13%	10%
Dogsledding*	Sweden	65%	29%	6%
	Total	33%	31%	36%
Outdoor photography (landscape, wildlife and nature, Northern Lights)**	Sweden	59%	41%	0%
	Total	34%	40%	25%

Nature studies (e.g., course or presentation about flora, fauna etc.)**

** - more relevant to slow adventure cluster in Iceland in comparison to other countries*

*** - less relevant to slow adventure cluster in*
Iceland in comparison to other countries

Figure 2.7.3. Relevance of various slow adventure activities for generating annual sales (n=17)

Figure 2.7.4 illustrates the extent to which various elements of slow adventure experience are included into nature-based tourism products currently offered by SMEs in the SAINT-Sweden cluster, as well as the extent to which these companies are interested in offering new nature-based tourism products that include elements of the slow adventure experience.

More than 70% of SAINT-Sweden cluster members identified that they already include the following elements, either to some extent or to a high extent, in the nature-based tourism products that they offer: inspiring connectedness with nature, human-powered slow journeys, physical wellness, as well as local, wild or slow food. However, relatively few SAINT-Sweden SMEs include herbal medicine as an element of the slow adventure product. At the same time, SAINT-Sweden cluster includes physical wellness at a significantly higher level compared to SMEs in other parts of the transnational slow adventure cluster. Furthermore, SAINT-Sweden SMEs expressed their willingness to include most of slow adventure elements into new nature-based tourism products to a higher extent than what they offer today.

Out of 17 members of the SAINT-Sweden cluster, 10 reported that they offer some form of accommodation to their guests:

- Bunk house accommodation (8 SMEs).
- Hotel (5 SMEs).
- Bed & Breakfast home stay (5 SMEs).
- Guest house (4 SMEs).
- Rental of cottages / self-catering (4 SMEs).
- Youth hostel (3 SMEs).
- Cottage camping (3 SMEs).
- Wild camping (2 SMEs).
- Glamping (2 SMEs).
- Farm stay (2 SMEs);
- Caravan camping (1 SME).
- Rental of apartments / self-catering (1 SME).
- Castle stay (1 SME).

11 SMEs that provide accommodation expressed their willingness to offer tourists a slow adventure experience and indicated that they are registered/approved by various organizations, including the

national and local tourism bodies, Airbnb and other third party agencies. In addition, one company reported that 100% of the ingredients used in their menu were produced locally, and five more companies indicated that 75% of the ingredients used in their menu were produced locally.

Figure 2.7.4. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company? To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience? (n=17)

The survey also included open-ended question about opportunities and threats associated with the introduction of a new "slow adventure" brand to market nature-based activities in Sweden. Responses to these open-ended questions reveal a range of common themes:

Opportunities

- *From competition to cooperation, enhancing collaboration between local SMEs and other stakeholders*:
    - "We grow strong together. We getting to know each other leads to cooperation."
- *Promotion of the local area*, increase the exposure of peripherally located micro-sized enterprises especially to new international markets:
    - "Unlimited. We have everything, but do not get it on the market."
    - "Wilderness, Sami culture, history and modern life, our hotel, people and knowledge."
    - "Marketing this to the Dutch market is basically all about possibilities, especially since outdoor activities are the ones that are sold the most and are most sought after right now."

Threats

Study participants also identified threats associated with the introduction of the slow adventure brand. These threats are:

- *Inadequate transport accessibility* to remote areas:
    - "Transport logistics to our area, dependency on transfer for those arriving by plane."
- *Limited capacity of micro-sized businesses* to participate in marketing activities and develop new products:
    - "Finding the right channel that reaches our customers. The ability to buy online is important."
    - "Channels to sell our products."
- The difficulties of translating the concept "slow adventure" from English to other languages.

Case Study Results and Findings

To initiate their cluster, the SAINT-Sweden team conducted the following activities:

- Establishment of a database that includes all relevant SMEs and stakeholders (i.e., accommodation, food and activity providers and landowners that rent their land as hunting grounds) involved in delivering the combined hunt and health slow adventure experience. The database included a total of 17 SMEs and other stakeholders, all of which participated in the slow adventure survey. Findings from the survey are presented in the next section.

- Participation in over 15 different meetings and workshops with various slow adventure stakeholders and actors to energize and activate the cluster. These included meetings with (i) Jämtland-Härjedalen Turism (2015), (ii) Gastronomy and Creative Entrepreneurship in Rural Tourism (Gastrocert) research project (2016), (iii) Joy Event (2016), (iv) UNESCO Creative Cities Network (2016), (v) Swedish National Commission to UNESCO (2016), (vi) Fjällnäs (2017), (vii) Eldrimner (2017), (viii) Inlandsbana (2017), and (ix) Peak Innovation (2017).

- In August 2017, the SAINT-Sweden team convened a Digital Slow Adventure Workshop in Myhrbodarna, Valsjöbyn (Sweden). SAINT-Sweden SMEs and partners met for an overnight workshop to discuss how to strengthen the local slow adventure brand by using digital platforms and various sales channels. Workshop participants also discussed how to collaborate on marketing activities to promote the slow adventure brand. The workshop also delivered a training session with a professional digital filmmaker that taught slow adventure SMEs to use smartphones to produce their own promotional videos. These videos can then be published on social media and used for digital and social media marketing campaigns.

- Throughout the project, the owner of the SME was engaged by ETOUR as guest lecturer to share her experience in the SAINT to ETOUR's students and researchers. It is estimated that over 60 ETOUR students and researchers had access to the SME owner's expertise related to slow adventure tourism development.

- The SME has also participated in the nature-based tourism related workshops organized by the third parties, including the workshop "Hjärta Kultur Natur" in Funäsdalen and "Innovativa Opplevelser" in Östersund. During these workshops, the SME owner was invited to discuss and promote the slow adventure concept. Through these activities, the SME owner established new contacts for the further development of slow adventure product packages.

- The SAINT project generated substantial momentum in the region for continuing to develop the slow adventure concept. As a result, the SME owner will continue commercializing the slow adventure brand following the conclusion of the SAINT project. This work is currently underway in collaboration with Peak Innovation, which is Jämtland's regional innovation system. The first task is development of a feasibility study funded by regional authorities in an effort to expand the economic opportunities of nature-based tourism in rural and peripheral areas.

The SAINT-Sweden team also conducted a wide range of marketing activities in order to support the development of their slow adventure cluster while advancing the slow adventure business concept within the context of the project. These marketing activities included:

- Twelve short videos were produced that promote the hunt and health slow adventure product via social media platforms. All of the videos were produced in Swedish and include English-language sub-titles.

- These videos were used as an input for the slow adventure social media marketing campaign conducted on Facebook and Instagram in Spring 2018.

- The SME owner's website has been updated to ensure compatibility with mobile devices. This allows the website to be used as a landing page for the social media marketing campaign.

- The SME owners presented the digital marketing campaign to ETOUR's second-year bachelor's students in a course titled, *E-Tourism: Digital Distribution, Marketing, and Information*. There were a total of 15 students in the class, which included students from Sweden as well as international students from the Erasmus program.

- A landing page for Slow Adventure Sweden has been established.

- Collaboration with the "Let's Go Slow" bloggers on a feature about hunting and mindfulness experiences in Ljungdalen (Sweden).

- ETOUR developed and pilot tested a customer survey that evaluates the perception of various elements of the slow adventure experience in hunting and health context.

Through these clustering and marketing activities, the SAINT-Sweden team helped to facilitate a new slow adventure package. This new package is a collaboration between two SMEs and their networks. The package includes two days of hunting with bird dogs, a hunting guide, full board, three nights in a cabin in a multi-bed room, sauna, "mountain spa" and purchase of a local hunting license. The package was initially offered in the fall of 2017.

Highlight 1: Digital Marketing and Social Media

The SAINT-Sweden team organized a digital marketing and filmmaking workshop. The workshop was attended by six members of the SAINT-Sweden cluster, along with a member of the SAINT-Scotland team. The workshop gave participants the skills to use their smartphones for making and editing their own digital, slow adventure films. These skills enable SMEs to easily produce their own multi-media content, thereby increasing SME and slow adventure presence on social media platforms such as Facebook and Instagram.

Following the workshop, a total of 12 slow adventure films were produced to promote the hunt and health slow adventure product. These movies were distributed via Facebook and Instagram as part of the social media marketing campaign in during the spring of 2018. Figure 1 offers a screen shot of the hunt and health Facebook post.

The workshop, associated films, and the marketing campaign is a good example of how the SAINT project helped to build the capacity of slow adventure SMEs to improve their marketing at a global, digital scale.

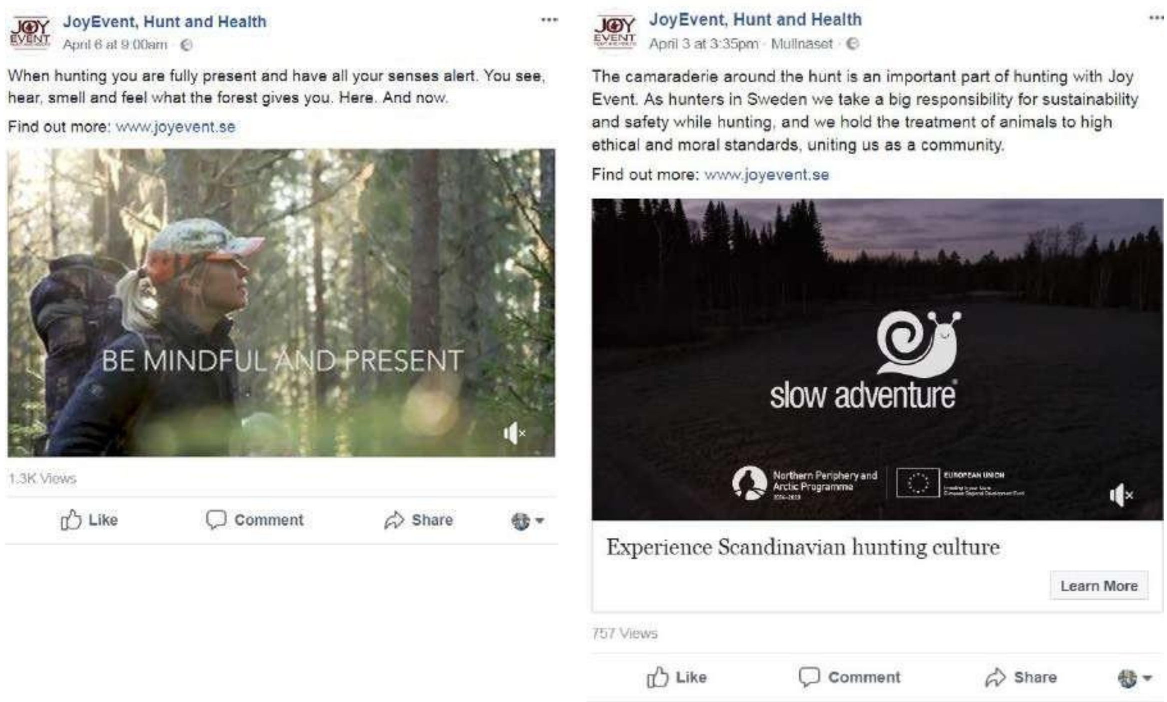


Figure 1. Screen shot of SAINT-Sweden social media marketing campaign

Highlight 2: Customer Experience Survey – Joy Event Pilot

The SAINT-Sweden team develop a customer experience survey for the hunt and health slow adventure product. The survey covers a range of elements that capture the profile of slow adventure tourists (or consumers) as well as the perceived consumer experience of slow adventure. A total of 219 slow adventure customers were invited to participate in the survey, and 59 completed the web-based questionnaire. This constitutes a response of 30%, which is considered to be a high response rate for on-line surveys. Detailed findings are presented in Appendix C, and the overarching theme from the survey as that guests are very happy. For example, 85% of respondents indicated that they are fully satisfied with their recent slow adventure experience provided by the hunt and health slow adventure SME. Figure 2.7.5 displays a summary of the survey process.

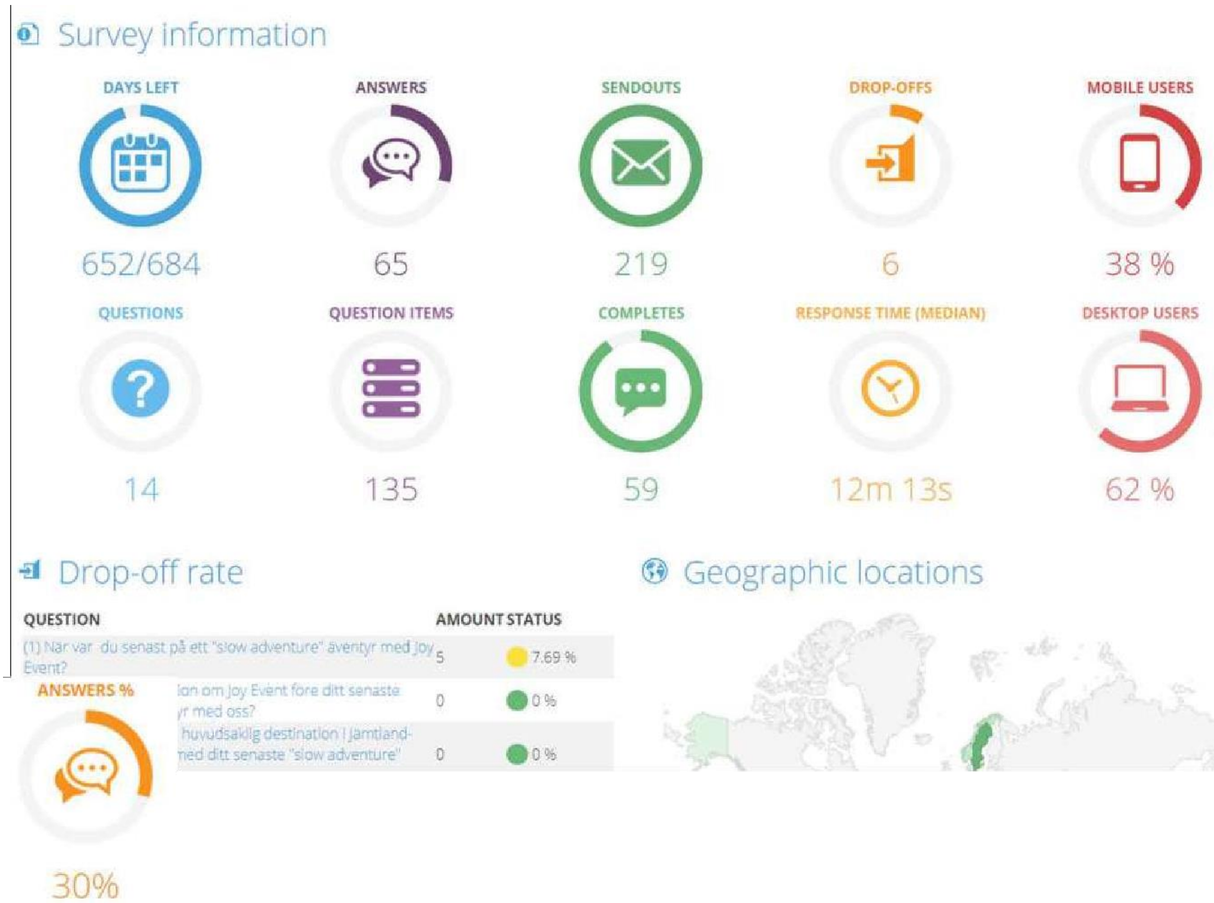


Figure 2.7.5. Overview of slow adventure customer experience survey process

2.8. Transnational cluster

The transnational cluster developed naturally as a result of the SAINT project's WP4 case study. By reaching out to SMEs working within the sector and testing various cluster models, each region adopted new 'ambassadors' for slow adventure, and with the close cooperation between each partner and partner regions, this group of 'ambassadors' has naturally become a transnational cluster.

Survey Results

This section presents a summary of the survey findings in order to describe the profile of the transnational cluster as a whole and to reflect on the similarities and dissimilarities across the seven SAINT partner countries.

Figure 2.8.1 indicates that SMEs operating across the transnational area offer slow adventure activities all year-round, and the low season periods in one country coincide with the high season periods in other countries. Therefore, the countries complement each other in terms of seasonality. More specifically, winter season in Finland is long (from December until April) and very important (i.e., highly relevant) for most SMEs in terms of income generation. In Iceland, summer (June through September) is the high season, but the winter months (December-March) are also important. In Ireland, Northern Ireland and Scotland the season starts in March, peaks in May-September and slows down in October. In Northern Ireland, however, November and December are important for more than half of SMEs. In Norway, the season peaks in summer from June through September, and winter activities are available in March and April. The peak season in Sweden is August and September, and the winter season lasts from December until April.

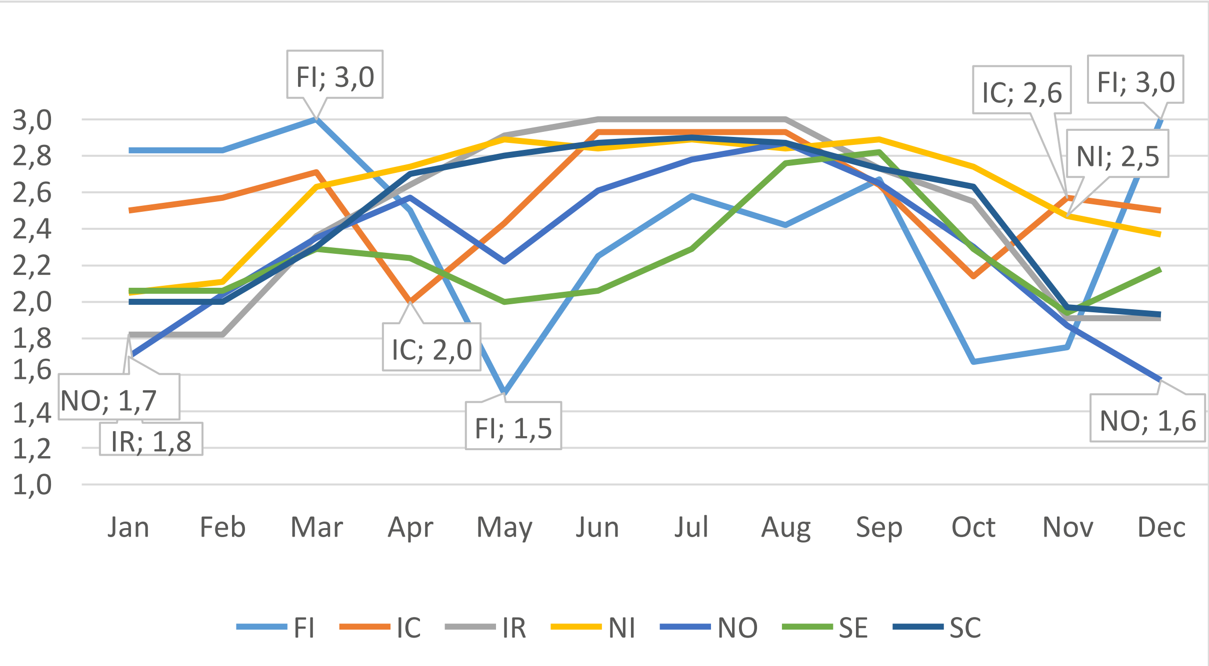


Figure 2.8.1. Seasonality: how relevant are the months of the year for generating annual sales in your company today? (1 – not relevant at all, 2 – somewhat relevant, 3 – highly relevant)

Figure 2.8.2 shows the common slow adventure, nature-based tourism activities that are typical for the northern periphery region. These activities are: (i) expeditions into nature, (ii) wildlife viewing and bird watching, (iii) cultural or heritage activities linked to nature, (iv) slow food cooking and outdoor cooking/dining experience, (v) hiking, recreational kayaking, (vi) canoeing, rowing, (vii) overnight stays combined with nature experience, (viii) fishing, outdoor photography, (ix) wild foraging, and (x) and nature studies. These core activities are highly or somewhat relevant (i.e., very or somewhat important) to a substantial proportion of slow adventure SMEs across the transnational area. Interestingly, the relative importance of these activities for generating annual sales is highest in Scotland, Finland and Ireland. At the same time, most of the core activities were less relevant for Iceland compared to the other SAINT countries. The primary exception was outdoor photography, which was significantly more relevant (more important) for Iceland than for every other SAINT country.

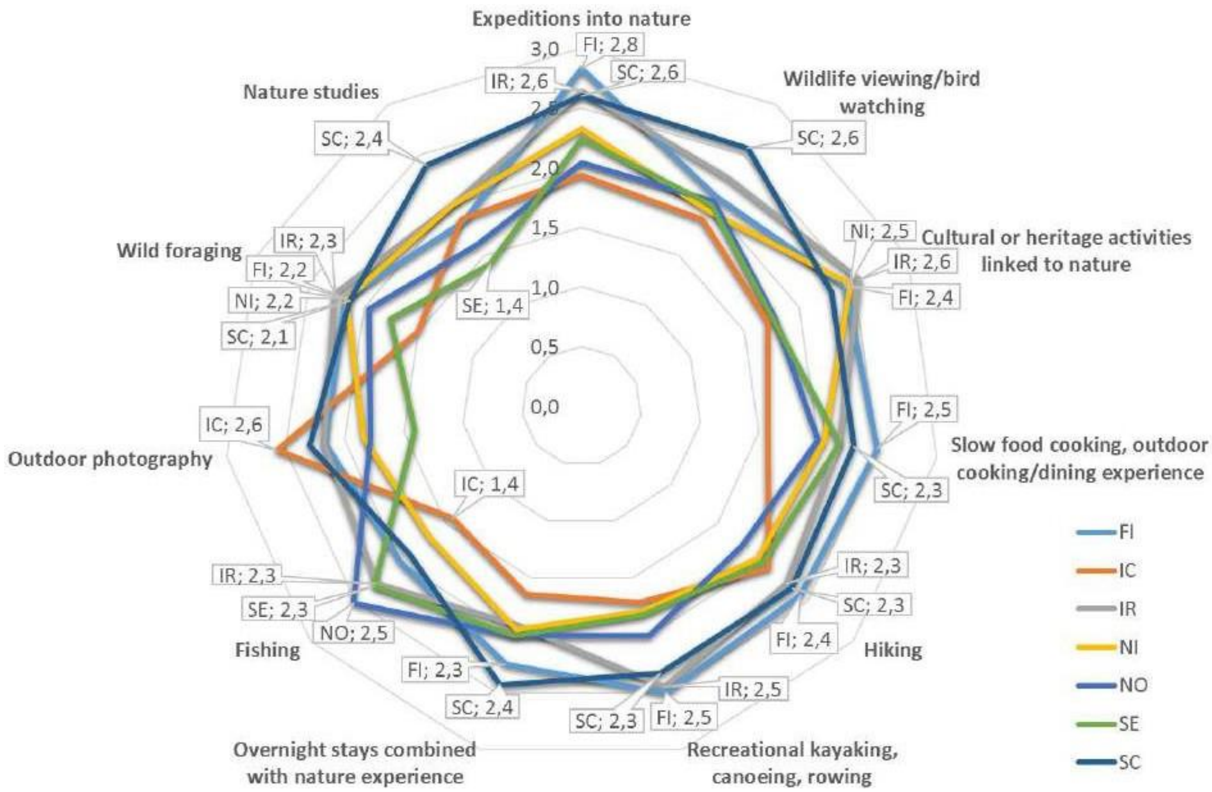


Figure 2.8.2. The relevance of core slow adventure activities for generating annual sales in SMEs (1 – Not relevant at all; 2 – Somewhat relevant; 3 – Highly relevant)

The range of other activities is country-specific and demonstrates how multifaceted the slow adventure experience can be (Figure 2.8.3). For example, Finnish SMEs form a cluster that offers slow adventure activities with a focus on the winter season, which includes snowshoeing, cross-country skiing, sauna, dogsledding, reindeer farm programs and lake swimming. A high proportion of SMEs in Norway and Sweden offer hunting and, similar to Finland, cross-country skiing, and snowshoeing. Activities that distinguish Iceland include ice cave tours, glacier hiking, caving and ice hiking. Biking on roads is the core country-specific slow adventure activity in Ireland, complemented by jogging, meditation and yoga in nature, picnicking, barging and food tours. Northern Ireland has a greater focus on food tours in comparison with the other countries in the project.

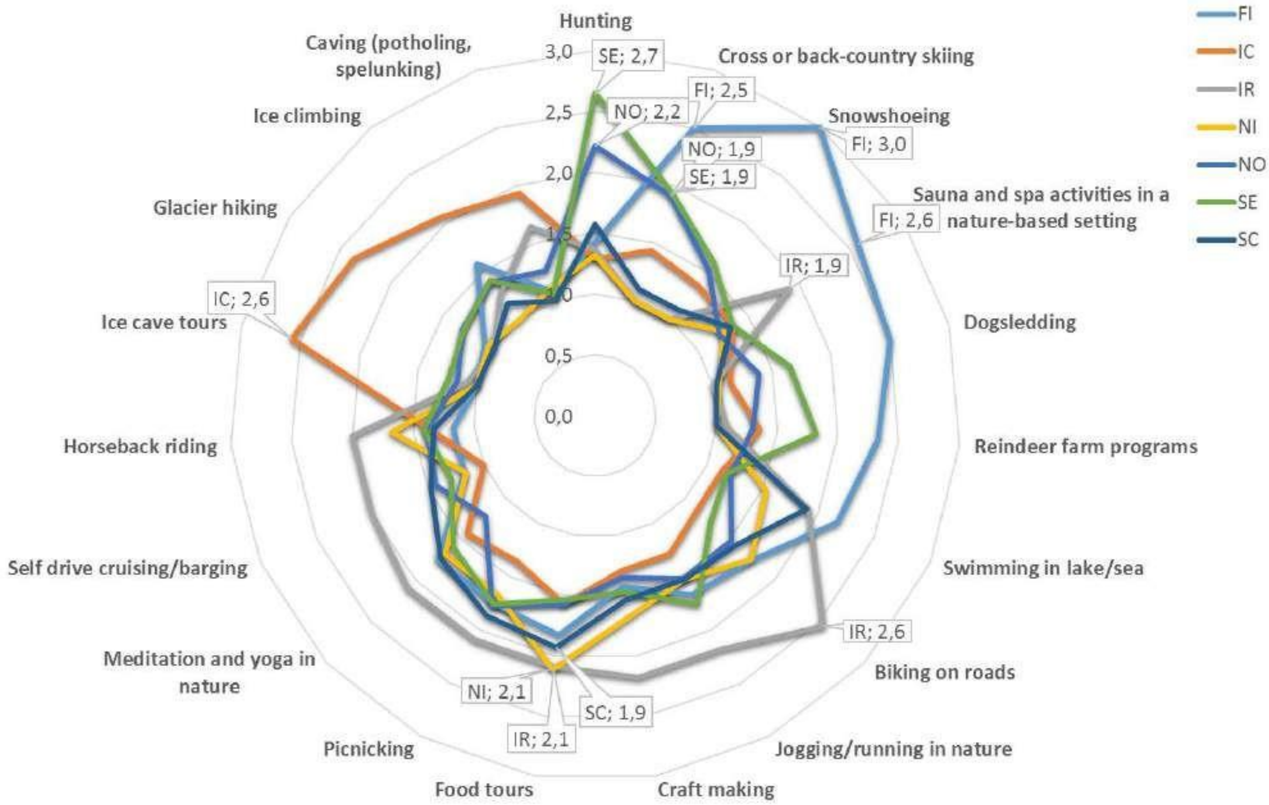


Figure 2.8.3. The relevance of country-specific slow adventure activities for generating annual sales in SMEs
(1 – Not relevant at all; 2 – Somewhat relevant; 3 – Highly relevant)

As shown in Figure 2.8.4, slow adventure SMEs across the transnational partnership offer their customers a diverse range of accommodation.. Additionally, Figure 2.8.5 illustrates the differences in accommodation provision among the partner countries.

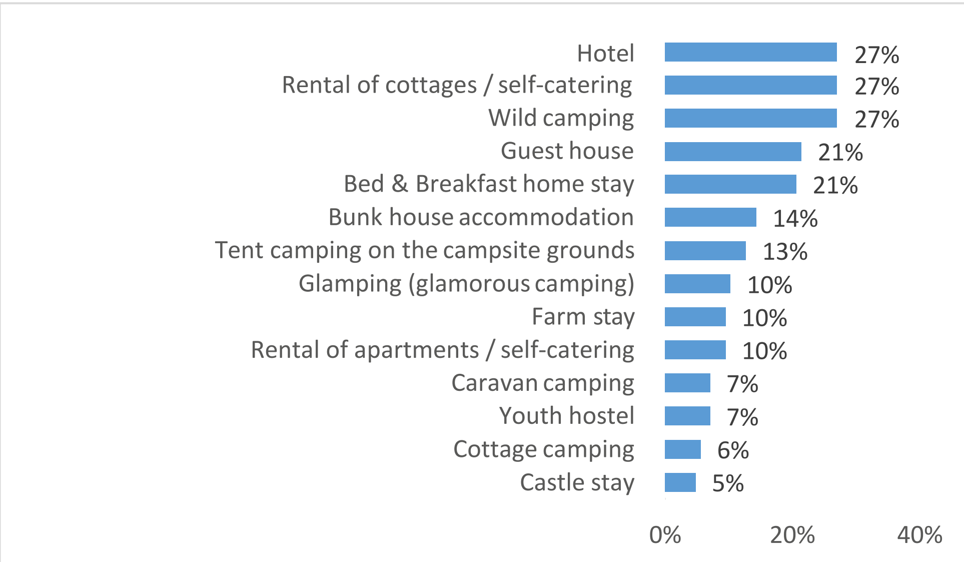


Figure 2.8.4. Forms of accommodation offered by SMEs in the transnational slow adventure cluster (N=126)

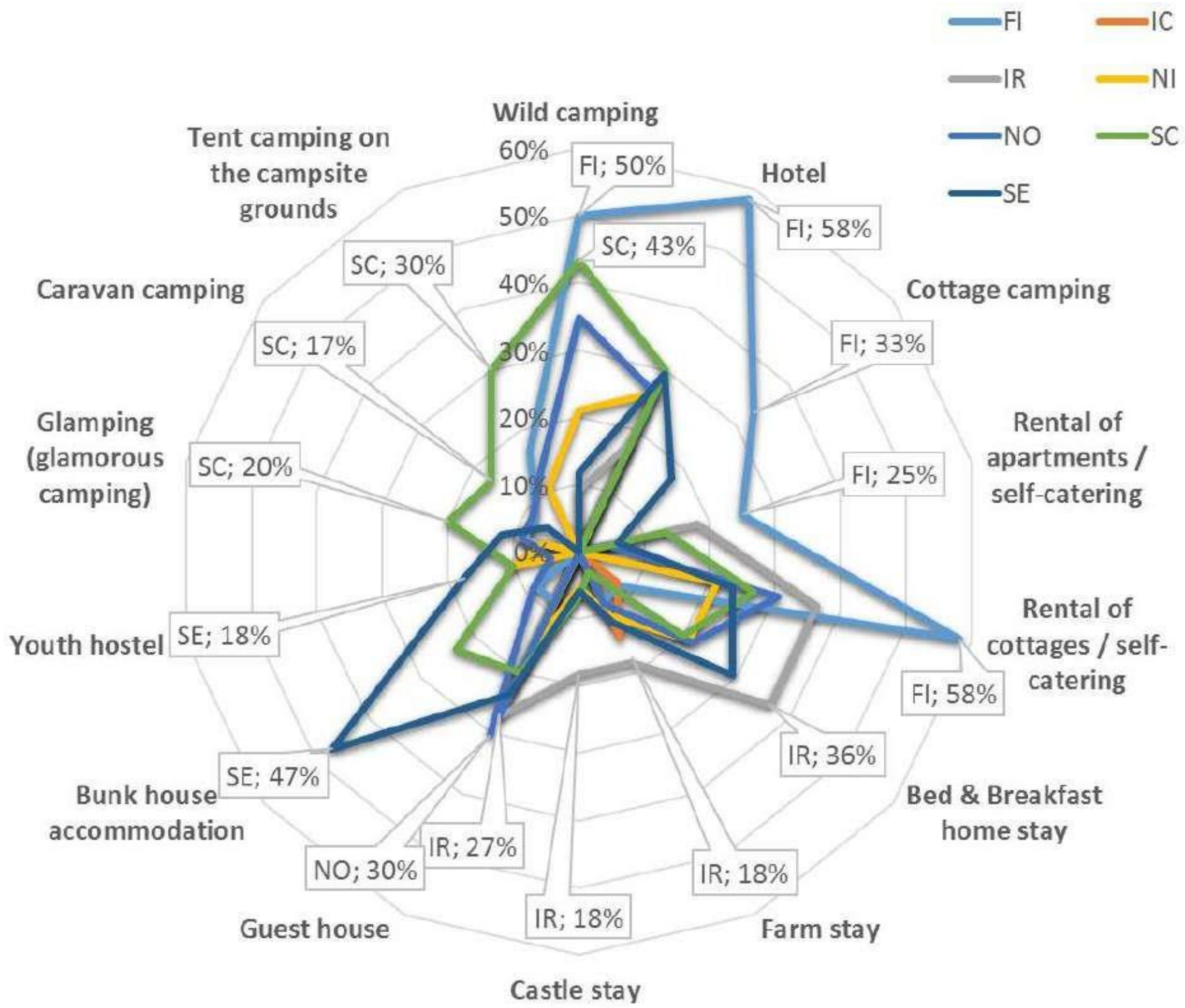


Figure 2.8.5. Forms of accommodation offered by slow adventure SMEs across partner countries

Hotels, rented cottages and wild camping are the most common forms of accommodation across the transnational cluster area; yet, slow adventure SMEs in Iceland do not offer these types of accommodation. Finland has the highest proportions of SMEs offering hotels, rented cottages, wild camping, cottage camping and rented apartments in comparison with other countries. Wild camping and hotels are the main accommodation forms for SMEs in Scotland. Scottish SMEs offer tent camping, glamping and caravan camping to a higher extent than SMEs in other countries. Ireland has a higher proportion of SMEs offering stays in B&Bs, on farms and in castles, while guest houses, rented cottages and apartments, as well as hotels are also important. Finally, when compared to other countries, the Swedish cluster has the highest proportion of slow adventure SMEs offering bunkhouse accommodation, which is also the main form of accommodation for the Swedish cluster.

Furthermore, evaluation of the slow adventure experience criteria clearly revealed the core pillars of slow adventure elements. This is important because these core pillars can – and should – shape the marketing message of the transnational cluster and brand. These core pillars are human-powered slow journeys, inspiring connectedness with nature, wildlife watching opportunities, nature interpretation, local, wild or slow food and outdoor skills. As shown in Figure 2.8.6, many SMEs across the transnational area already include these core slow adventure elements into their nature-based product to a "high extent" or "at least to some extent The inclusion of local, wild, or slow food was significantly more relevant (more important) for SMEs in Finland compared to the other SAINT countries. In addition, there is a range of slow adventure elements, such as physical and emotional wellness, storytelling, outdoor living and nature-powered slow journeys, which are included to "a less extent" and, therefore, play a complementary role in slow adventure experience currently offered by SMEs in the transnational cluster. Physical wellness (e.g., spa, sauna, massages etc.)is, however, an exception as it is included to a "very high extent" by SMEs in the Finnish cluster.

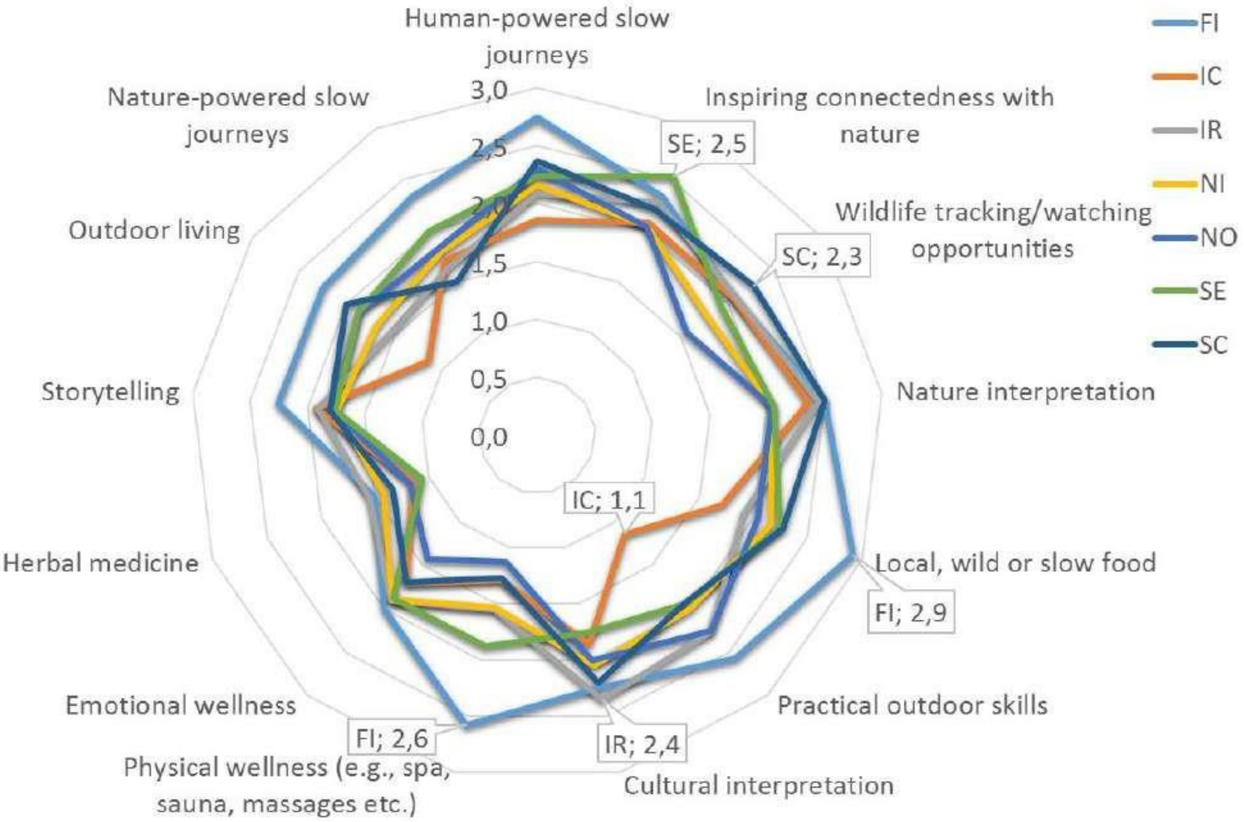


Figure 2.8.6. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company?
(1 – Not included at all ; 2 – Included to some extent; 3 – Included to a high extent)

Figure 2.8.7 indicates the extent to which SMEs across the transnational area are interested in offering new nature-based tourism products that include the various elements of the slow adventure experience. The SMEs in the transnational cluster exhibit a willingness to include the slow adventure elements in new products to a higher extent, while the relative increase is highest for such elements as nature-powered slow journeys, outdoor living, storytelling and herbal medicine. In particular, Ireland and Northern Ireland are interested in increasing substantially the integration of all elements in their new nature-based products. In addition, Finland has the capacity to include herbal medicine and wildlife watching to a higher extent, and Scotland is interested in offering nature-based products that focus on nature-powered slow journeys and herbal medicine (similar to Finland).

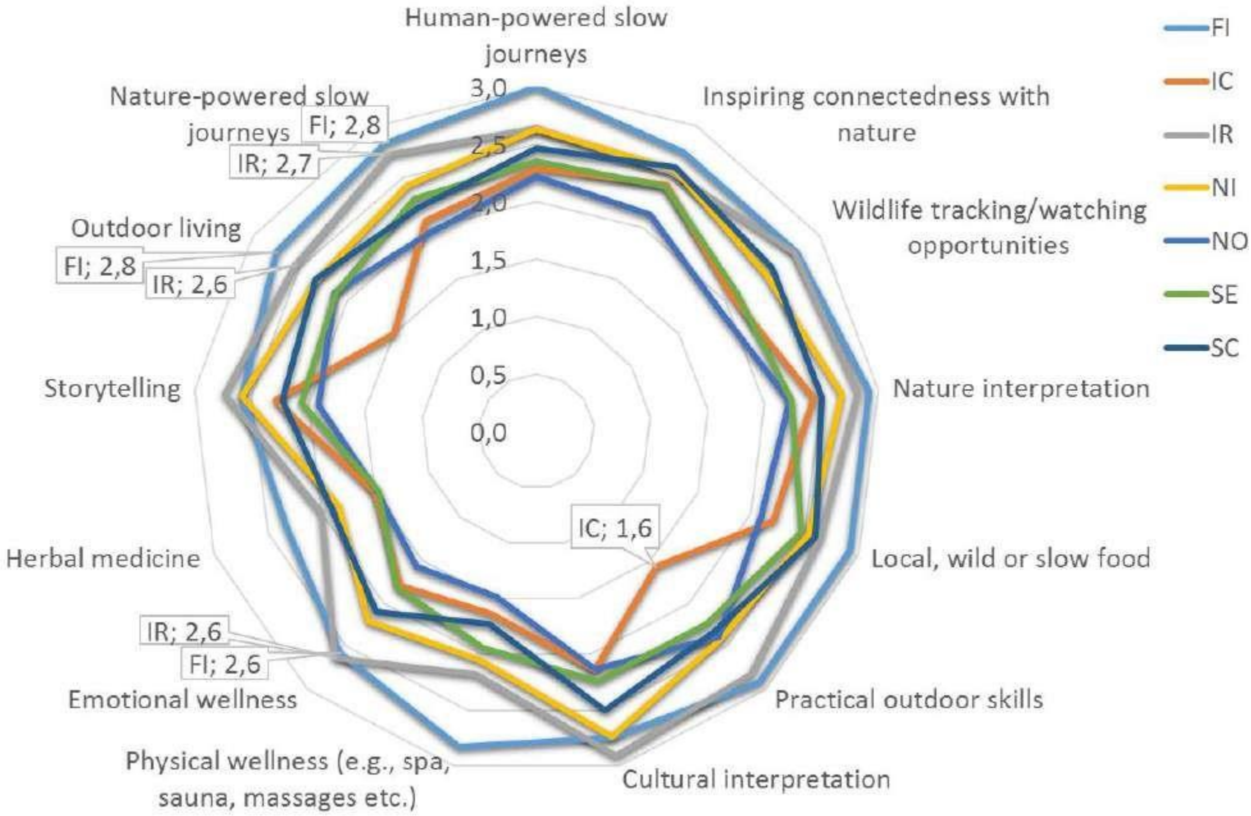


Figure 2.8.7. To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience?
(1 – Not interested at all ; 2 – Interested to some extent; 3 – Interested to a high extent)

The activities, which shape the profile of slow adventure experience opportunities in the Nordic countries, are provided almost entirely by micro-sized businesses, which heavily depend on well-established partnerships to support their business processes. Therefore, another aspect of the survey involved open-ended question about opportunities and threats associated with the introduction of a new "slow adventure" brand to market nature-based activities in each partner area. Responses to these open-ended questions revealed a range of common themes. For example, SMEs across the seven countries expressed positive opinions regarding the new "slow adventure" brand. Respondents perceived the brand as a tool for enhancing collaboration between local SMEs and other stakeholders, as well as a mechanism to promote international cooperation. The companies addressed the common brand as a way to increase the exposure of peripherally located micro-sized enterprises especially to new international markets and associate remote areas with a high quality experience. Respondents also mentioned the benefits of a common brand, including participation in joint online marketing and social media campaigns, access to new (e.g., online) booking channels, targeting customers willing to stay longer and try other, more immersive ways of being in nature, as well as extending the tourism season.. The SMEs also highlighted that "slow adventure" as a product concept offers a ready-to-use profile for companies that already offer or are able to offer slow adventure activities, but lack experience or capacity to develop their product or reach the market. Notably, many businesses discussed the opportunity of using the new "slow adventure" brand to raise the environmental awareness of a wider audience about the issues of protection and preservation of wilderness in the remote areas of the European north.

Likewise, SMEs frequently mentioned environmental issues among the potential threats of using the new "slow adventure" brand as the possible negative outcome of increasing tourist flows and, consequently, increasing the pressure on fragile and remote areas. Other issues of concern were the risk of companies using the brand only for marketing purposes without actually committing to the values behind the "slow adventure" concept. Other perceived threats included possible conflicts of interests with stakeholders and activities, as well as the need to compete with other brands. Inadequate transport accessibility to remote areas and limited capacity of micro-sized businesses to participate in and, therefore, benefit from collaboration, can also hamper the adoption and development of the new "slow adventure" brand. Finally, respondents also addressed the difficulties of translating the concept "slow adventure" from English to other languages (i.e., Finnish, Swedish, Norwegian and Icelandic).

Transnational Marketing Campaign

Despite the development and existence of this transnational cluster, unless the project developed a coherent campaign to tie together this cluster visually and reach the slow adventure consumer, the effort would remain a by-product of a project with limited results for the SMEs involved. The marketing sub-group, led by UHI, agreed that the transnational cluster would need to be developed through a transnational marketing campaign – Slow Adventuring - which would focus mainly on digital marketing and social media.

Initially UHI established campaign pages on social media to target potential slow adventure consumers, to raise awareness about slow adventure as a new tourism product, and to share and promote marketing material related to the slow adventure experiences developed through the project in each partner region.

Facebook www.facebook.com/slowadventuring - promoting slow adventure experiences and businesses from each country with calls to action. Initially most partner regions sent photos to UHI to share but as the campaign developed admin rights were given to project coordinators in each country so that they could also post for their own regions. The Facebook page now has 607 followers.

Instagram @slowadventuring – posting inspiring photos of slow adventures from each country. UHI and the Let's Go Slow bloggers have been posting.

Pinterest – created Pin Boards to inspire consumers. Some boards were developed for the general concept of Slow Adventure - then one board for each region with photos of existing Slow Adventures in each region.

Twitter – a Twitter account replicates activities on Facebook

Most posts have been supported by the hashtag #slowadventuring to catalogue content related to the SAINT project and Slow Adventure in a business context

UHI also coordinated with Let's Go Slow (www.letsgoslow.com) – bloggers who experience and create content on Slow Adventure in northern Europe – to visit each partner region, experience slow adventures developed through the SAINT, create content (which visually unifies each region) and share on the Let's Go Slow blog site and on the Slow Adventuring pages. UHI also coordinated an Instagram takeover schedule for each region.

Each region has now developed its own regional campaign page to promote their slow adventures and the transnational landing page (www.slowadventure.org) links to each regional landing page via a map. All content using #slowadventuring is streamed onto the landing page and is a strong visual representation of the transnational cluster. As discussions around the future of Slow Adventure as a movement continue, it is envisaged that www.slowadventure.org will become the main website for Slow Adventure®.

One of the most valuable outputs of the transnational cluster developed through SAINT is the trademark, successfully applied for, across the EU and in Iceland and Norway, by UHI. This trademark will allow businesses to use the Slow Adventure® logo as a stamp of recognition of a high quality immersive experience beyond the project.

A set of guidelines, both for the development and marketing of a slow adventure, including the use of the Slow Adventure® brand, has been developed by UHI and will be available for SMEs beyond the project.

To complement the efforts of the digital marketing campaign, UHI attended VisitScotland Expo, the main travel trade show in Scotland, in both 2017 and 2018, to gauge the travel industry's response to Slow Adventure as a tourism product. Ireland, Northern Ireland and Scotland also attended the Adventure Travel Conference in London Olympia in January 2018 to gauge the adventure travel industry. All three events were very successful and further supported the partnership's confidence in Slow Adventure as a movement and strong responsible tourism product.

Synthesis of Results and Findings

- Clusters shape the constellation of actors while marketing activities that focus on final customers (i.e., consumers of slow adventure experiences) define the content of collaboration between stakeholders. In all of the SAINT case studies, marketing activities required the initiation of local/regional slow adventure clusters, and at the same time, the process of cluster development also catalyzed and shaped marketing activities. In this sense, marketing and clustering are mutually inter-dependent and reinforcing processing. The development of slow adventure products, packages, and itineraries lies at the center of these processes. It is important to note that cluster initiation requires a significant investment of time, engagement and cultivation. Findings from the survey and case studies reinforce the existing scientific literature that cluster development is essentially a network building and outreach activity.

- Results from the survey and case studies provide insight into the ways that SME´s form clusters in order to market and deliver a full range of slow adventure experiences, and ultimately, build the slow adventure experience and associated brand. The core pillars of the "slow adventure" brand include elements such as human-powered slow journeys, inspiring connectedness with nature, wildlife watching opportunities, nature interpretation, local, wild or slow food as well as the honing of outdoor skills. These core pillars (or themes) are highly relevant to SMEs involved in the SAINT project and constitute the essence of "slow adventure" as a product concept.

- Typical nature-based activities available across the project area include expeditions into nature, overnight stays combined with nature experiences, wildlife viewing, hiking, recreational kayaking, canoeing and rowing, outdoor photography, as well as slow cooking and foraging. These activities, which shape the profile of slow adventure experience opportunities in the SAINT partnership countries, are delivered primarily by micro-sized businesses, which depend heavily on well-established partnerships to support their business processes. The survey and case studies revealed that these companies consider a wide range of potential benefits of using a new transnational "slow adventure" brand, including participation in joint marketing and social media campaigns, access to new online booking channels, targeting premium customer segments, extending the tourism season, and increasing the awareness of environmental issues among potential visitors and clients. Most importantly, the "slow adventure" product concept shapes the marketing message of the transnational cluster and brand, which companies can use to develop their product and reach the market.

- Despite varying levels of engagement from DMOs across the SAINT partnership, nearly every partner in the SAINT project discussed various challenges associated with their regional DMOs (or related organizations) in advancing the slow adventure effort. By collaborating with local, regional and national DMOs, the SAINT project partners contributed to the enhancement of slow adventure community clusters. Findings from the SAINT project suggest that community cluster development was most evident in Iceland, Ireland, Northern Ireland, and Norway.

- As introduced at the beginning of this report, holistic clusters are comprised of operators, transport and accommodation providers. This type of cluster is known as a vertical value chain and includes, for example, providers involved in the delivery of packaged tourism products at a specific destination (e.g., transportation, accommodation, activities and attractions, tour guides etc.). The case study findings indicate that the SAINT-Sweden cluster is holistic in nature as it is comprised by SMEs and other commercial and non-commercial stakeholders involved at different points in the slow adventure value chain. Another example is the establishment of a Slow Adventure Cooperative by the SAINT-Scotland team, which is a not-for-profit spin-off social enterprise that will market slow adventure experiences. Moreover, all SAINT project partners used the slow adventure guidelines that were initially developed and tested by the SAINT-Ireland team. Use of these guidelines enabled the development of new slow adventure packages, thereby contributing to the development of holistic clusters across the SAINT partnership.

- The SAINT-Finland case study focused on SME collaboration with the purpose of identifying and satisfying the needs of specific tourist segments (e.g., European and Chinese markets), thus contributing to clustering by target market.

- All SAINT project partners conducted traditional (i.e., off-line and online) as well as social media marketing activities. Iceland, Ireland and Sweden implemented various social media marketing campaigns, and Northern Ireland conducted a comprehensive marketing campaign encompassing a broad range of off-line, online and social media activities. For example, the SAINT-Scotland team successfully participated in the VisitScotland Expo, the main travel trade show in Scotland, in both 2017 and 2018 to promote the slow adventure as a new product concept. All countries established the national webpages for promoting the slow adventure activities in their countries and across the transnational area as a whole. All partners posted on the joint slow adventure social media pages on facebook and Instagram and used the hashtag #slowadventuring to catalogue content related to the SAINT project and Slow Adventure in a business context. Every partner collaborated with the Let's Go Slow (www.letsgoslow.com) bloggers, who tested the slow adventure experiences across the seven partner countries, created, and shared the content on the Let's Go Slow blog site and on the Slow Adventuring pages.

- This report forms the basis for the development of the Slow Adventure Business Strategy, which will be delivered by the Lead Partner during the summer of 2018.

Acknowledgements

The ETOUR team acknowledges the contributions from the entire SAINT partnership to this report. The ETOUR team drew from a wide range of materials to prepare this document and we thank the SAINT partnership for this collective effort.

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Appendices

Appendix 1. Work package 4 project application.

3.1.1	*Deliverable* *Written report*	*Target value* *1*	*Delivery month (02.2016)*
Activity 3.2	*Activity title* *Qualitative interviews*	*Start month* *March 2015*	*End month* *February 2016*
Description To supplement the above information, face-to-face or telephone interviews, as appropriate, will be conducted with SMEs in the sector, Destination Marketing Organisations and national promotional bodies, will be consulted to determine information such as new and/or lucrative consumer segments, how to target these customers and ways to extend the tourist season (and other relevant questions).			Deliverables *Written report B*
3.2.1	*Deliverable* *Written report*	*Target value* *1*	*Delivery month (02.2016)*
Activity 3.3	*Activity title* *Qualitative Customer Interviews*	*Start month* *March 2015*	*End month* *June 2015*
Description Online, qualitative customer questionnaires will be undertaken by all partners, co-ordinated by the WP leader, in order to better understand customer needs and desires, and therefore to also inform the development of WP4. These will be augmented by face-to-face interviews by the WP leader, to inform WP4 activity.			Deliverables *Written report C*
3.3.1	*Deliverable* *Written report*	*Target value* *1*	*Delivery month (06.2015)*
Activity 3.4	*Activity title* *Dissemination workshops*	*Start month* *Febuary 2016*	*End month* *February 2016*
Description Two workshops will be organised by each project partner, to which SMEs will be invited, to disseminate the findings to and discuss with SMEs and public-sector and academic organisations. Joint activity with WP5 and WP4.			Deliverables Dissemination workshop
3.4.1	*Deliverable* *SME-engagement workshop*	*Target value* *16*	*Delivery month (02.2016)*

WP Nr	WP title	WP start month	WP end month	Estimated % of total project budget allocated to Work package
4	Development and Piloting of New Marketing and Clustering Models	September 2015	February 2018	40%

Partners' involvement	
WP responsible partner	ETOUR
Involved partners	All partners
What is the role of What is the role of each partner Description	In each partner region, the partner(s) will undertake the following activity, co-ordinated by ETOUR:

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	• Disseminate activity proposals to SMEs and recruit SMEs as case studies. • Undertake case studies, as negotiated with the WP leader. • Refine the case studies as appropriate. • Synthesise the regional results. • Aid the WP leader to create a suitable 'package' for branding. • Disseminate findings regionally.
Does this Work Package connect or have interdependencies with other work packages? Select work package connectivity	3+5+6

Summary description of work package connectivity and interdependencies with other work packages.

The activities in this WP will be directly dependent upon the findings of WP3. The identification of new market trends, customer typologies and new markets and how to reach them will have direct bearing on appropriate marketing models and approaches. WP5, exploring new technology in the contect of slow adventure tourism marketing, and WP6, incorporating Indigenous and Western perspectives on issues like engaging storytelling, will both likewise influence how to market effectively and inspirationally to consumers.

Summary description and objective of the work package and specify to which project objective it contributes

The core work package of the SAINT project, WP4 aims to help SMEs in this sector by developing a) new marketing approaches and b) more effective business generation through clustering or 'co-operative working'. The project will develop and test new marketing models to:

- Regionally cluster slow adventure SMEs together and develop common values.
- Target high-value customers, and enable longer operating seasons.
- Trans-nationally cluster slow adventure SMEs together, harnessing the shared characteristics of the places and environments in which they operate, with appropriate joint branding measures.

The process will entail:

Engagement of SMEs

The first stage will be for partners to publicise and disseminate the proposed activities of this WP to a suitable SME audience. Engaging with businesses is key to the success of this WP; it is important that not only slow adventure companies but also support services are involved, such as accommodation providers, transport and food, so that the project takes a more overarching view of business development. Through targeted dissemination, wider promotion and the use of workshops, the aim will be to recuit a number of SMEs, and other stakeholders as appropriate, to involve them as case studies (see below), as well as acting as ambassadors for the project. This will include SMEs to take part in a trans-national cluster case study. This workshop to engage SMEs will be a joint activity with WPs 3 and 5, when the dissemination of results from those WPS will also take place - and act as a spur for recruiting.

The WP leader will work with the individual partners to choose appropriate partner areas and SMEs/stakeholders for the consequent activities.

Defining Clustering and Marketing Models

In collaboration with partners as appropriate, the WP leader will lead a research exercise of the marketing literature and a desktop review of existing applied market and clustering approaches, within and beyond the tourism industry, in order to develop a suite of marketing models and clustering approaches to be tested in this WP.

These 'clustering' approaches could include:

- Trans-national clusters.
- Community clusters.
- Holistic clusters with eg. operators, transport and accommodation providers.
- SMEs clustered by 'target market'.

Marketing models could include:

- Traditional approaches.
- Models utilising social media.
- Approaches based on mobile technology.

Defining those approaches that would be applicable to slow adventure and tested in the case studies would entail questions such as : Why are they appropriate? How would they work? What are the advantages to SMEs?

This exercise will result in a written report highlighting methodology, identification of suitable models and approaches and recommendations of the ensuing case studies.

Marketing Models

- Pilot testing of the above: three case studies of different marketing models.
- Further development and refinement of models.
- Qualitative interviews with clients to enable customer profiling and inform refinement of the approach.
- Roll out of approaches to two further partner areas.

The methodology is detailed in 4.3 and 4.4 below.

Clustering Approaches

- Pilot testing of clustering approaches through three case studies: two SME clusters and one community cluster, for example.
- Further development and refinement of clusters.
- Qualitative interviews with clients to enable customer profiling and inform refinement of the approach.
- Roll out of approaches to two further partner areas.

The methodology is detailed in 4.5 and 4.6 below.

Trans-national Cluster

- Pilot testing of a trans-national cluster, involving SMEs from all partner areas, as appropriate.
- Development and refinement of the cluster.
- Qualitative interviews with clients booking through the cluster to enable customer profiling and inform refinement of the approach.

The partner budgets allow for each partner to take an associate partner, generally an SME or body representing SME interests, to trans-national meetings to develop suitable relationships and understand how other SMEs operate.

The methodology is detailed in 4.7 below.

Transferring Results to SMEs in Partner Regions

Engaging with SMEs to transfer the results and outcomes of this WP is obviously a core project activity, in terms of making businesses moe aware of opportunities and able to act upon the.

It is anticipated that there will be dissemination to regional businesses and organisations through at least two webinars, seminars or workshops in each partner area (for example), run in conjunction with:

- Destination marketing organisations.
- National membership (adventure) tourism organisations.
- Regional development agencies.
- Business start-up support services.
- Community development companies.
- Tourism intelligence organisations.

This will be a joint activity with WP6, to also disseminate results on 'Two Eyed seeing'.

The final trans-national partner meeting will allow discussion between all the partners on the success of the models and approaches and the wider rollout to SMEs/stakeholders. These discussions will have particular relevance for considerations of trans-national clustering and promotion.

The WP leader will lead the development of a written report, detailing:

- The objectives of the WP.
- The methodology, with detailed case studies.
- Results.
- Recommendations, with implementable actions.

Products and services (outputs)			
List which product(s)/service(s) from section C.3.1 this work package delivers or contributes to.	New marketing models toolkit New clustering approaches toolkit New trans-national SME cluster		
Please describe activities within the work package.			
Activity 4.1	*Activity title* Engagement of SMEs	*Start month* *September 2015*	*End month* *February 2016*
Description Promoting the WP and recruiting SMEs and other key stakeholders to participate in the WP. A joint workshop with WPs 3 and 5 will be the main spur of recruitment activity (see WP3 for 'workshop' deliverables). This will enable the WP leader to decide on appropriate SMEs/stakeholders to use as case studies.			Deliverables List of engaged SMEs and stakeholders in each partner area.
4.1.1	*Deliverable* *Written list*	*Target value* *8*	*Delivery month (02.2016)*
Activity 4.2	*Activity title* Development of marketing and clustering models	*Start month* *September 2015*	*End month* *February 2016*
Description			Deliverables

Transferring Results to SMEs in Partner Regions Engaging with SMEs to transfer the results and outcomes of this WP is obviously a core project activity, in terms of making businesses moe aware of opportunities and able to act upon the. It is anticipated that there will be dissemination to regional businesses and organisations through at least two webinars, seminars or workshops in each partner area (for example), run in conjunction with: • Destination marketing organisations. • National membership (adventure) tourism organisations. • Regional development agencies. • Business start-up support services. • Community development companies. • Tourism intelligence organisations. This will be a joint activity with WP6, to also disseminate results on 'Two Eyed seeing'.

The final trans-national partner meeting will allow discussion between all the partners on the success of the models and approaches and the wider rollout to SMEs/stakeholders. These discussions will have particular relevance for considerations of trans-national clustering and promotion.

The WP leader will lead the development of a written report, detailing:

- The objectives of the WP.
- The methodology, with detailed case studies.
- Results.
- Recommendations, with implementable actions.

Products and services (outputs)		
List which product(s)/service(s) from section C.3.1 this work package delivers or contributes to.	New marketing models toolkit New clustering approaches toolkit New trans-national SME cluster	

Please describe activities within the work package.			
Activity 4.1	*Activity title* Engagement of SMEs	*Start month* *September 2015*	*End month* *February 2016*
Description Promoting the WP and recruiting SMEs and other key stakeholders to participate in the WP. A joint workshop with WPs 3 and 5 will be the main spur of recruitment activity (see WP3 for 'workshop' deliverables). This will enable the WP leader to decide on appropriate SMEs/stakeholders to use as case studies.			Deliverables List of engaged SMEs and stakeholders in each partner area.
4.1.1	*Deliverable* *Written list*	*Target value* *8*	*Delivery month (02.2016)*
Activity 4.2	*Activity title* Development of marketing and clustering models	*Start month* *September 2015*	*End month* *February 2016*
Description			Deliverables

The WP leader will both research the marketing literature and undertake a desktop review of existing applied market and clustering approaches, in order to develop a suite of marketing models and clustering approaches to be tested in this WP.			Written review
4.2.1	*Deliverable* *Written review*	*Target value* *1*	*Delivery month (02.2016)*
Activity 4.3	*Activity title* Marketing model case studies	*Start month* *March 2016*	*End month* *October 2016*
Description This phase of the WP will entail pilot testing, in three case studies, set in different trans-national partner areas, of different marketing models. The recruited SMEs/stakeholders, as appropriate, will apply and use the defined approach in each case, in close collaboration with the local partner and WP leader. The approach will have the flexibility to be refined and tweaked as necessary. At the end of the season, the local partner will work with the SME(s) to understand the elements that were successful, those that weren't and how the approach could be modified and improved. This will be augmented by undertaking a small number of qualitative interviews with customers to aid refinement of the approaches, as well as helping to develop customer profiles. A written report on each case study will be fed back to the WP leader, which will collate responses.			Deliverables Written case study reports
4.3.1	*Deliverable* *Case study report*	*Target value* *3*	*Delivery month (10.2016)*
Activity 4.4	*Activity title* Rollout of marketing models to other partner areas	*Start month* *March 2017*	*End month* *October 2017*
Description Phase two of the marketing model case studies will entail rolling out successfully tested models to two other (different) partner areas. These locations will be chosen at an appropriately-timed trans-national partner meeting, when the WP leader will feedback to the partnership the results of Activity 4.3. Again, the recruited SMEs/stakeholders, as appropriate, will apply and use the defined approach in each case, in close collaboration with the local partner and WP leader. At the end of the season, the local partner will work with the SME(s) to understand how well the model worked. This will be augmented by undertaking a small number of qualitative interviews with customers to develop customer profiles. A written report on each case study will be fed back to the WP leader.			Deliverables Written case study reports
4.4.1	*Deliverable* *Case study report*	*Target value* *2*	*Delivery month (10.2017)*
Activity 4.5	*Activity title* Clustering approaches case studies	*Start month* *March 2016*	*End month* *October 2016*
Description This phase of the WP will entail pilot testing, in three case			Deliverables

studies, set in different trans-national partner areas, of different clustering approaches. The recruited SMEs/stakeholders, as appropriate, will apply and use the defined approach in each case, in close collaboration with the local partner and WP leader. The approach will have the flexibility to be refined and tweaked as necessary. At the end of the season, the local partner will work with the SME(s) to understand the elements that were successful, those that weren't and how the approach could be modified and improved. Again, this will be augmented by undertaking a small number of qualitative interviews with customers to aid refinement of the approaches, as well as helping to develop customer profiles. A written report on each case study will be fed back to the WP leader.			Written case study reports
4.5.1	*Deliverable* *Case study report*	*Target value* *3*	*Delivery month (10.2016)*
Activity 4.6	*Activity title* Rollout of clustering approaches to other partner areas	*Start month* *March 2017*	*End month* *October 2017*
Description Phase two of the clustering approaches case studies will entail rolling out successfully tested approaches to two other (different) partner areas. These locations will be chosen at an appropriately-timed trans-national partner meeting, when the WP leader will feedback to the partnership the results of Activity 4.5. Again, the recruited SMEs/stakeholders, as appropriate, will apply and use the defined approach in each case, in close collaboration with the local partner and WP leader. At the end of the season, the local partner will work with the SME(s) to understand how well the approach worked. This will be augmented by undertaking a small number of qualitative interviews with customers to develop customer profiles. A written report on each case study will be fed back to the WP leader, which will collate responses.			Deliverables Written case study reports
4.6.1	*Deliverable* *Case study report*	*Target value* *2*	*Delivery month (10.2017)*
Activity 4.7	*Activity title* *Trans-national SME cluster*	*Start month* *March 2016*	*End month* *February 2018*
Description Setting up and pilot testing of a new trans-national cluster of slow adventure SMEs, and other businesses and/or organisations if appropriate, will be the focus. The WP leader will a) liase with all the partners to determine the appropriate trans-national composition of SMEs and b) work with the SMEs to initiate and develop the cluster and its consequent joint branding and promotional activity. The operation of the cluster will be co-ordinated and supported principally by the WP leader, in collaboration with other partners. At the end of the first 'season' the approach will be reviewed, refined and expanded as appropriate, deteremined by the SMEs themselves in collaboration with the WP leader. Again, this will be augmented by undertaking a small number of qualitative interviews with customers to aid refinement of the approaches, as well as			Deliverables Trans-national cluster group of SMEs

helping to develop customer profiles.			
4.7.1	*Deliverable* *Trans-national cluster*	*Target value* *1*	*Delivery month (02.2018)*
Activity 4.8	*Activity title* *Dissemination of case study findings (A)*	*Start month* *October 2017*	*End month* *February 2018*
Description In each partner area, at least two dissemination forums will be held. This reflects the large geographical area of partners. Choosing from a variety of media, such as workshops, seminars and webinars, partners will publicise the open access events and invite suitable stakeholders, to feedback the aims, methodology, results and recommendations from the WP. These events will also be used to disseminate findings from WP6.			Deliverables Workshops/seminars/webinars
4.8.1	*Deliverable* *Seminar/webinar/workshop*	*Target value* *16 (2 per partner area)*	*Delivery month (02.2018)*
Activity 4.9	*Activity title* *Dissemination of case study findings (B)*	*Start month* *October 2017*	*End month* *February 2018*
Description The WP leader, in collaboration with the other partners, will create a written report on the WP: the aims, methodology, results and recommendations. This will be publicised widely in the partner areas, as well as in the associate partner areas, and made publicly available.			Deliverables Written report
4.9.1	*Deliverable* *Written report*	*Target value* *1*	*Delivery month (02.2018)*

WP Nr	WP title	WP start month	WP end month	Estimated % of total project budget allocated to Work package
5	Review of New Technology in Promoting Slow Adventure	March 2015	February 2016* (* but updated throughout the project to reflect the pace of technological change)	12%
Partners' involvement				
WP responsible partner	Naturpolis			
Involved partners	All partners, with particular input from HiNT and Wild Norway			
What is the role of What is the role of each partner Description	Each of the partners, co-ordinated by Naturpolis, will contribute with regional and national examples of good practice, to aid the WP leader in creating a report for businesses, and will also disseminate results to regional SMEs and other key players.			
Does this Work Package connect or have interdependencies with other work packages? Select work package connectivity	3+4			

Summary description of work package connectivity and interdependencies with other work packages.

This work package will draw from the data gathering exercise. Although WP3 is not concerned directly with how new consumer groups can be reached through the application of new technology, for example, it is clear that the exercise, as a spin-off, is very likely to uncover technology-centred solutions. These will be taken account of in the activity in WP5.

It is also apparent that the development and testing of new marketing approaches in WP4 will draw upon technological elements, as well as entrepreneurial and social for example. These two WPs will largely be undertaken in parallel therefore, to ensure appropriate cross-fertilisation of ideas and concepts.

Summary description and objective of the work package and specify to which project objective it contributes

The objective of this work package is to complement the work in WP4 through exploring the use of new technologies in supporting the development of 'greater market reach' for SMEs in this sector, especially how to use mobile technologies to reach existing and new customers. The outcomes of this WP will directly feed into the development of the marketing/clustering models in WP4.

A review of 'state of the art' in tourism technology will be conducted, concentrating in particular on the 'pre-booking' aspects of slow adventure experiences: how to effectively communicate with those consumer typologies identified in WP3, how to portray the essence of slow adventure to the customer, and how to connect with customers using mobile technologies in particular.

Regarding this latter element, as it is difficult to adequately 'explain' slow adventure, visual solutions will be explored that can be used at trade fairs or available through tourist offices for example. The Norwegian partners will explore, and pilot-test, digital storytelling as a means of making SMEs more visible in the market place (see 5.2 for more details).

This exercise will entail both desktop components and liaison with appropriate SMEs, marketing organisations and technology developers. Co-ordinated by the WP leader, all partners will contribute to this process.

Transferring Results to SMEs in Partner Regions

A marketing-driven WP, the output will be a report on the state of the art in terms of new technological solutions, and suggestions for wider implementation.

As per WP3, the dissemination of the outcomes of this exercise to SMEs is core. The two seminars organised in each partner area in WP3 will jointly be used as a formal mechanism for enagaging SMEs with the use of new marketing technology.

The report will be widely disseminated through partners to SMEs in this sector, or those wishing to expand into this sector, as well as appropriate organisations.

Although this WP is intended to be completed in the main by February 2016, the unceasing nature of technological change means that the report may well need to be revisited and revised by the WP leader to reflect new trends

Products and services (outputs)

List which product(s)/service(s) from section C.3.1 this work package delivers or contributes to.	Review of marketing technology	

Appendix 2. English language version of the Slow Adventure survey.

slow adventure
IN NORTHERN TERRITORIES

Northern Periphery and Arctic Programme

EUROPEAN UNION
Investing in your future
European Regional Development Fund

Dear survey participant!

This survey is part of the "Slow Adventure in Northern Territories" (SAINT) project, which aims to help companies in this sector diversify their business and improve their marketing strategies. The project has partners in seven countries across Northern Europe.

The survey is designed to support the establishment of a network of enterprises associated with slow adventure tourism and the development of new slow adventure products. SMEs (small- and medium-sized enterprises) associated with slow adventure tourism encourage their customers to enjoy and experience the outdoors at a slow pace and to engage with remote, wild and nature-rich places.

The questions in the survey focus on the profile of SMEs in the project area that (i) offer nature-based products with elements of a slow adventure experience; (ii) support the provision of slow adventure experiences offered by other companies; and/or (iii) are interested in offering slow adventure experiences to their customers in the future.

Please note: your answers are saved each time you click on the arrow to move on to the next page. If you leave the browser or loose connection, please click on the link to the survey in the email received to take you back to the survey. Your answers from the previous session should appear.

More information about the SAINT project is available on the web:

http://saintproject.eu/

slow adventure

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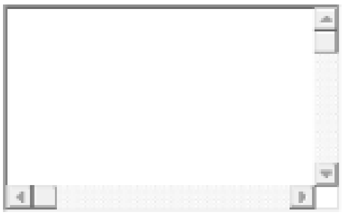
1. How relevant are the following business areas for generating annual sales in your company today?

1 – Not relevant at all
2 – Somewhat relevant
3 – Highly relevant

	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
Accommodation	○	○	○
Agriculture or forestry	○	○	○
Commercial fisheries	○	○	○
Education and group events	○	○	○
Guides/Guiding services	○	○	○
Organization of festivals and events	○	○	○
Organization of tours	○	○	○
Provision of information (e.g. Tourist visitor centre)	○	○	○
Hire or sale of activity equipment	○	○	○
Restaurant/café/shop/catering/food/beverages	○	○	○
Transportation	○	○	○

Other highly relevant business areas (please, specify):

Other somewhat relevant business areas (please, specify):



slow adventure

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2. How relevant are the following nature-based activities for generating annual sales in your company today?

Please, tick all boxes that apply to your company

1 - Not relevant at all
2 - Somewhat relevant
3 - Highly relevant

	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
Air sports (parachuting, paragliding, hang gliding, base jumping, etc.)	○	○	○
Biking on roads	○	○	○
Caving (potholing, spelunking)	○	○	○
Craft making	○	○	○
Cross or back-country skiing	○	○	○
Cultural or heritage activities linked to nature	○	○	○
Dogsledding	○	○	○
Downhill skiing and snowboarding (including backcountry skiing, off-piste skiing)	○	○	○
Expeditions into nature (i.e., wilderness/remote travel, mostly non-motorized)	○	○	○
Fishing	○	○	○
Food tours	○	○	○
Geocaching	○	○	○

	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
Glacier hiking			
Gorge walking, canyoning			
Hiking			
Horseback riding			
Hunting			
Ice cave tours			
Ice climbing			
Ice skating			
Jogging/running in nature			
Kayaking, canoeing, rowing (recreational, excluding white water)			
Meditation and yoga in nature			
Motorbiking, off-road driving, quad bike riding			
Motorboating, waterscootering			

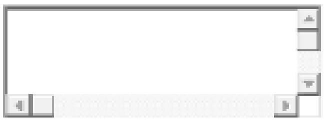
	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
Mountain biking			
Nature studies (e.g., course or presentation about flora, fauna, geology; landscape/ecological interpretation tours etc.)			
Nordic walking			
Orienteering			
Outdoor photography (landscape, wildlife and nature, Northern Lights)			
Overnight stays combined with nature experience (e.g., camping in the wilderness, treetop cabins, igloos etc.)			
Paintball, outdoor play			
Paddle boats			

Picnicking			
Reindeer farm programs			
Rock-climbing, mountaineering			
Sailing, windsurfing			

	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
Sauna and spa activities in a nature-based setting			
Self drive cruising/barging			
Sightseeing by boat, cruising, fjord cruises, sea rafting			
Snowmobiling			
Snowshoeing			
Slow food cooking, outdoor cooking/dining experience			
Stand up paddle boarding			
Swimming in lake/sea			
Underwater activities (e.g., diving, snorkelling)			
Water-skiing, wakeboarding			
White water rafting, kayaking, canoeing			
Wild foraging (e.g., berry picking, mushroom harvesting, etc.)			
Wildlife viewing/bird watching/wildlife safari			

Other highly relevant activities (please, specify):

Other somewhat relevant activities (please, specify):



slow adventure

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3. How relevant are the months of the year for generating annual sales in your company today?

1 – Not relevant at all
2 – Somewhat relevant
3 – Highly relevant

	1 Not relevant at all	2 Somewhat relevant	3 Highly relevant
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

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4. Location

Where is your company registered?

Please provide your postcode.

Where does your company primarily arrange its nature-based activities?

Please provide the postal codes of the nearest communities or settlements (city/town/village); alternatively you can provide the geographical coordinates (latitude and longitude) of the places.

5. Employees

How many employees were employed by your company in total during last 12 months?

	0	1	2-3	4-5	6-10	11-20	More than 20
Year round full time employees							
Year round part time employees							
Seasonal full time employees							
Seasonal part time employees							

How many employees working at your company were at least partly engaged in nature-based activities during last 12 months?

	0	1	2-3	4-5	6-10	11-20	More than 20
Year round full time employees							
Year round part time employees							
Seasonal full time employees							
Seasonal part time employees							

6. Slow adventure elements of the tourism experience

Slow adventure is a form of tourism that avoids the adrenalin-pumping hits of convenient adventure experiences, in favour of slow, immersive journeys. Slow adventure typically includes:

- Passage through wild places
- Finding comfort (and being comfortable) in the outdoors
- Taking time to 'be' in nature

The following set of questions focuses on the importance of slow adventure elements in nature-based activities provided and/or supported by your company.

slow adventure

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7. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product currently offered by your company?

1 – Not included at all
2 – Included to some extent
3 – Included to a high extent

Slow journeys:

Slow journeys are human-powered or nature-powered movement in nature excluding transfers. Slow journeys tend to involve human-powered movement (i.e., hiking or paddling), but can also rely on other forms of mobility that connect customers to natural rhythms (e.g., horse riding or dog sledding). In this way, slow journeys seek to provide customers with the opportunity to be fully immersed in their environment or experience:

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Human-powered slow journeys	○	○	○
Nature-powered slow journeys	○	○	○

Outdoor engagement:

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Practical outdoor skills e.g., bushcraft, fishing, making camp, foraging	○	○	○
Cultural interpretation - local/indigenous traditions, heritage, stories, music, arts and crafts	○	○	○

Nature interpretation – understanding local wildlife, plants, landscape, climate, etc.			

Natural wellness (i.e., wellness programs integrated into outdoor hospitality experience and dependent on nature-based tourism resources)

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Physical wellness (e.g., spa, sauna, massages etc.)			
Emotional wellness, e.g., mindfulness			
Herbal medicine			

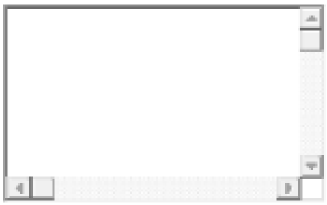
Other slow adventure elements

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Local, wild or slow food			
Wildlife tracking/watching opportunities			
Storytelling			
Outdoor living			
Inspiring connectedness with nature			

Other slow adventure elements included in the nature-based tourism product currently offered by your company

Included to a high extent (please, specify):

Included to some extent (please, specify):



8. To what extent are the following elements of the slow adventure experience included in the nature-based tourism product **currently offered by products and service providers with which you work**(e.g., accommodation services, transfers etc.)?

1 – Not included at all
2 – Included to some extent
3 – Included to a high extent

Slow journeys as human-powered or nature-powered movement in nature excluding transfers:

	1 Not included at all	2 Included to some extent	Included to a high extent
Human-powered slow journeys			
Nature-powered slow journeys			

Outdoor engagement:

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Practical outdoor skills e.g., bushcraft, fishing, making camp, foraging			
Cultural interpretation - local/indigenous traditions, heritage, stories, music, arts and crafts			
Nature interpretation – understanding local wildlife, plants, landscape, climate, etc.			

Natural wellness

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Physical wellness (e.g., spa, sauna, massages etc.)			
Emotional wellness, e.g., mindfulness			
Herbal medicine			

Other slow adventure elements

	1 Not included at all	2 Included to some extent	3 Included to a high extent
Local, wild or slow food			
Wildlife tracking/watching opportunities			
Storytelling			
Outdoor living			
Inspiring connectedness with nature			

Other slow adventure elements included in the nature-based tourism productcurrently offered by products and service providers with which you work (e.g., accommodation services, transfers etc.)

Included to a high extent (please, specify):

Included to some extent (please, specify):

slow adventure

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9. To what extent are you interested in offering new nature-based tourism products, which integrate the following elements of the slow adventure experience?

1 - Not interested at all
2 - Somewhat interested
3 - Very interested

Slow journeys as human-powered or nature-powered movement in nature excluding transfers:

	1 Not interested at all	2 Somewhat interested	3 Very interested
Human-powered slow journeys	○	○	○
Nature-powered slow journeys	○	○	○

Outdoor engagement:

	1 Not interested at all	2 Somewhat interested	3 Very interersted
Practical outdoor skills e.g., bushcraft, fishing, making camp, foraging	○	○	○
Cultural interpretation - local/indigenous traditions, heritage, stories, music, arts and crafts	○	○	○
Nature interpretation – understanding local wildlife, plants, landscape, climate, etc.	○	○	○

Natural wellness

	1 Not interested at all	2 Somewhat interested	3 Very interested

Physical wellness (e.g., spa, sauna, massages etc.)			
Emotional wellness, e.g., mindfulness			
Herbal medicine			

Other slow adventure elements

	1 Not interested at all	2 Somewhat interested	3 Very interested
Local, wild or slow food			
Wildlife tracking/watching opportunities			
Storytelling			
Outdoor living			
Inspiring connectedness with nature			

Other slow adventure elements you are interested to integrate in new nature-based tourism products)

Very interested (please, specify):

Somewhat interested (please, specify):

slow adventure

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10. To what extent are you **interested in working with other companies** to support the following elements of slow adventure experience (e.g., by providing accommodation services, transfers etc.or by forming a cluster to create a slow adventure experience)?

1 – Not interested at all
2 – Somewhat interested
3 – Very interested

Slow journeys as human-powered or nature-powered movement in nature excluding transfers:

	1 Not interested at all	2 Somewhat interested	3 Very interested
Human-powered slow journeys	○	○	○
Nature-powered slow journeys	○	○	○

Outdoor engagement:

	1 Not interested at all	2 Somewhat interested	3 Very interested
Practical outdoor skills e.g., bushcraft, fishing, making camp, foraging	○	○	○
Cultural interpretation - local/indigenous traditions, heritage, stories, music, arts and crafts	○	○	○
Nature interpretation – understanding local wildlife, plants, landscape, climate, etc.	○	○	○

Natural wellness

	1 Not interested at all	2 Somewhat interested	3 Very interested
Physical wellness (e.g., spa, sauna, massages etc.)			
Emotional wellness, e.g., mindfulness			
Herbal medicine			

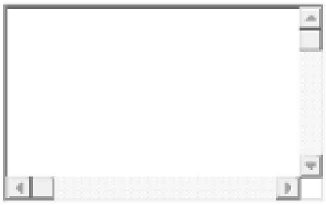
Other slow adventure elements

	1 Not interested at all	2 Somewhat interested	3 Very interested
Local, wild or slow food			
Wildlife tracking/watching opportunities			
Storytelling			
Outdoor living			
Inspiring connectedness with nature			

Other slow adventure elements <u>provided by other companies</u> you are interested to support (e.g., by providing accommodation services, transfers etc. or by forming a cluster to create a slow adventure experience)

Very interested (please, specify):

Somewhat interested (please, specify):



11. Do you offer any of the following forms of accommodation to your customers?

(you can choose more than 1 box)

- ☐ Hotel
- ☐ Bed & Breakfast home stay
- ☐ Youth hostel
- ☐ Guest house
- ☐ Cottage camping
- ☐ Caravan camping
- ☐ Tent camping on the campsite grounds
- ☐ Bunk house accommodation
- ☐ Wild camping
- ☐ Glamping (glamorous camping)
- ☐ Rental of cottages / self-catering
- ☐ Rental of apartments / self-catering
- ☐ Farm stay
- ☐ Castle stay
- ☐ Other (please, specify):

____

- ☐ No, we do not provide accommodation to our customers

12. The questions on this page are designated to those companies which provide accommodation to their customers.

Do you think your accommodation could offer the tourist a slow adventure experience and why?

- Yes
- No

Please, provide your comments below:

If yes, are you registered/approved by any of the following bodies?

- National Tourism body
- Local tourism group
- Local Co-operative group
- AA
- Airbnb
- Other (please, specify):

How much of the ingredients on your menu are produced locally?

- 100%
- 75%
- 50%

- 25%
- None

What is a typical local dish?

13. Opportunities and threats of a new "slow adventure" brand

What opportunities do you see regarding the introduction of a new "slow adventure" brand to market nature-based activities in your area?

What threats do you see regarding the introduction of a new "slow adventure" brand to market nature-based activities in your area?

14. Next steps

Please recommend any other company/companies (e.g., your partner/partners), which you think should participate in this survey? Please provide the contact details (e.g., e-mail, webpage or Facebook page address)

Appendix 3. Transnational survey findings: core elements and themes

SME SURVEY RESULTS OVERVIEW

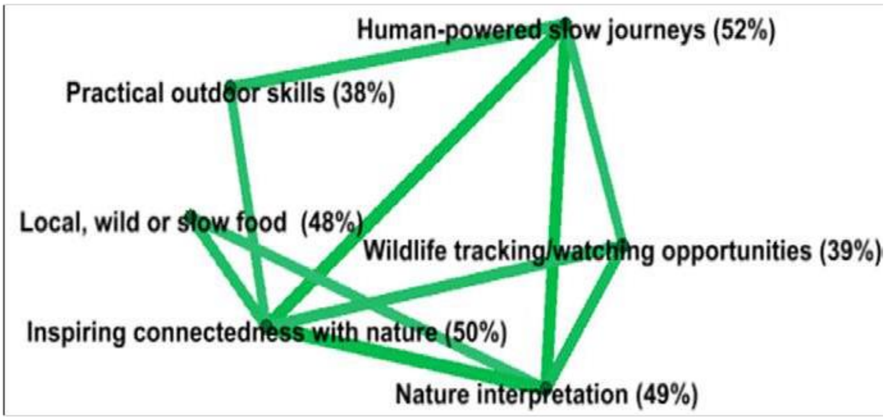
Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	**Total**
12	14	11	19	23	30	17	**126**

SLOW ADVENTURE ELEMENTS – Included to a high extent

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
Human-powered slow journeys	75%	29%	36%	42%	52%	53%	53%	**49%**
Local, wild or slow food	92%	21%	27%	42%	39%	43%	53%	**44%**
Inspiring connectedness with nature	50%	29%	45%	42%	35%	40%	71%	**44%**
Nature interpretation – understanding local wildlife, plants, landscape, climate, etc.	58%	50%	64%	26%	26%	53%	35%	**43%**
Practical outdoor skills e.g., bushcraft, fishing, making camp, foraging	67%	0%	45%	32%	44%	27%	18%	**32%**
Wildlife tracking/watching opportunities	25%	43%	36%	16%	17%	40%	29%	**29%**
Nature-powered slow journeys	50%	29%	9%	32%	22%	13%	35%	**25%**
Cultural interpretation - local/indigenous traditions, heritage, stories, music, arts and crafts	33%	14%	36%	21%	22%	27%	12%	**23%**
Emotional wellness, e.g., mindfulness	42%	21%	9%	26%	13%	17%	29%	**21%**
Storytelling	25%	29%	9%	16%	13%	20%	24%	**19%**
Outdoor living	25%	0%	9%	16%	13%	30%	24%	**18%**
Physical wellness (e.g., spa, sauna, massages etc.)	67%	7%	0%	11%	0%	10%	24%	**14%**
Herbal medicine	8%	0%	9%	5%	4%	3%	0%	**4%**

SLOW ADVENTURE ELEMENTS – Core Pillars

Human-powered slow journeys
Inspiring connectedness with nature
Wildlife watching opportunities
Nature interpretation
Local, wild or slow food
Practical outdoor skills



SLOW ADVENTURE ACTIVITIES

- Highly relevant across the transnational area

- Expeditions into nature (i.e., wilderness/remote travel, mostly non-motorized)
- Wildlife viewing/bird watching/wildlife safari
- Recreational kayaking, canoeing, rowing
- Hiking
- Overnight stays combined with nature experience (e.g., camping in the wilderness, treetop cabins, igloos etc.)
- Slow food cooking, outdoor cooking/dining experience
- Outdoor photography
- Cultural or heritage activities linked to nature
- Fishing
- Wild foraging, e.g., berry picking, mushroom harvesting, etc.
- Nature studies

SLOW ADVENTURE ACTIVITIES

- Highly relevant across the transnational area

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
Expeditions into nature	83%	29%	64%	47%	35%	73%	47%	**54%**
Wildlife viewing/bird watching/wildlife safari	33%	29%	46%	26%	35%	67%	35%	**41%**
Kayaking, canoeing, rowing (recreational, not white water)	50%	21%	55%	21%	35%	60%	35%	**41%**
Hiking	58%	36%	36%	26%	26%	53%	41%	**40%**
Overnight stays combined with nature experience	42%	21%	36%	26%	35%	63%	35%	**40%**
Slow food cooking, outdoor cooking/dining experience	58%	14%	36%	26%	30%	47%	53%	**38%**
Outdoor photography	42%	71%	36%	26%	22%	50%	6%	**36%**
Cultural or heritage activities linked to nature	50%	14%	64%	58%	13%	37%	18%	**34%**
Fishing	25%	14%	46%	11%	61%	23%	41%	**32%**
Wild foraging (e.g., berry picking, mushroom harvesting, etc.)	33%	14%	46%	32%	35%	37%	18%	**31%**
Nature studies	8%	29%	36%	26%	13%	50%		**25%**

SLOW ADVENTURE ACTIVITIES

- Country-specific

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
Hunting		7%	9%	11%	48%	13%	65%	**24%**
Cross or back-country skiing	67%	7%			30%		41%	**18%**
Snowshoeing	100%	7%			17%		18%	**16%**
Sauna and spa activities in a nature-based setting	67%	7%	27%			7%	6%	**12%**
Dogsledding	58%				17%		12%	**10%**
Reindeer farm programs	50%	14%			9%		29%	**12%**
Swimming in lake/sea	42%		27%	11%	4%	23%		**14%**
Ice cave tours		64%			4%		6%	**9%**
Glacier hiking		50%			13%		6%	**9%**
Caving (potholing, spelunking)		36%	18%	5%	4%			**7%**
Ice climbing	17%	29%	9%		17%	3%	12%	**11%**
Meditation and yoga in nature	8%	7%	36%	21%	9%	20%	24%	**18%**
Jogging/running in nature	25%	7%	36%	11%	4%	7%	29%	**14%**
Picnicking	8%	7%	36%	11%	22%	20%	29%	**19%**
Biking on roads	17%		64%	11%	13%	10%	12%	**15%**
Self drive cruising/barging			36%		13%	10%	6%	**9%**
Food tours	8%	14%	27%	37%	13%	23%	24%	**21%**

SLOW ADVENTURE ACTIVITIES

- Less relevant

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
Stand up paddle boarding	17%		27%	11%	4%	20%	6%	**12%**
Sightseeing by boat, cruising, fjord cruises, sea rafting		7%	18%		9%	27%	6%	**11%**
Craft making	8%		27%	16%	9%	3%	18%	**10%**
Sailing, windsurfing			18%	5%	4%	27%		**10%**
Rock-climbing, mountaineering	8%	7%		5%	13%	10%	18%	**10%**
Horseback riding			27%	11%	13%	7%	6%	**9%**
Paddle boats		7%	27%		9%	10%		**7%**
Orienteering	17%			11%	4%	10%	6%	**7%**
Underwater activities (e.g., diving, snorkelling)			9%	5%	4%	17%		**6%**
Gorge walking, canyoning			27%	5%		3%	6%	**5%**
Nordic walking	25%				4%		6%	**4%**
Geocaching				11%	4%		6%	**3%**
Paintball, outdoor play				11%	4%			**2%**
Ice skating	8%				4%		6%	**2%**

SLOW ADVENTURE - SEASONALITY

- Highly relevant

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
January	92%	57%	18%	32%	9%	30%	41%	**36%**
February	92%	64%	18%	32%	26%	30%	35%	**39%**
March	100%	79%	46%	63%	52%	40%	53%	**58%**
April	67%	21%	64%	74%	61%	77%	47%	**61%**
May	8%	57%	91%	90%	39%	83%	29%	**60%**
June	33%	93%	100%	84%	70%	87%	41%	**74%**
July	58%	93%	100%	90%	83%	90%	65%	**83%**
August	50%	93%	100%	90%	87%	90%	88%	**87%**
September	67%	71%	82%	90%	74%	77%	88%	**79%**
October	8%	36%	64%	79%	44%	67%	47%	**52%**
November	17%	64%	18%	53%	13%	23%	29%	**30%**
December	100%	64%	27%	53%	9%	27%	47%	**41%**

SLOW ADVENTURE – ACCOMMODATION PROVIDED

	Finland	Iceland	Ireland	Northern Ireland	Norway	Scotland	Sweden	Total
Hotel	58%	0%	18%	26%	26%	30%	29%	**27%**
Wild camping	50%	0%	9%	21%	35%	43%	12%	**27%**
Rental of cottages / self-catering	58%	0%	36%	21%	30%	27%	24%	**27%**
Guest house	8%	21%	27%	16%	30%	20%	24%	**21%**
Bed & Breakfast home stay	8%	7%	36%	21%	22%	20%	29%	**21%**
Bunk house accommodation	8%	0%	0%	0%	9%	23%	47%	**14%**
Tent camping on the campsite grounds	17%	0%	0%	11%	13%	30%	0%	**13%**
Glamping (glamorous camping)	8%	0%	9%	5%	9%	20%	12%	**10%**
Rental of apartments / self-catering	25%	7%	18%	0%	4%	13%	6%	**10%**
Farm stay	8%	14%	18%	11%	9%	3%	12%	**10%**
Youth hostel	0%	0%	0%	11%	4%	10%	18%	**7%**
Caravan camping	8%	0%	0%	0%	9%	17%	6%	**7%**
Cottage camping	33%	0%	0%	0%	0%	0%	18%	**6%**
Castle stay	0%	0%	18%	5%	0%	7%	6%	**5%**