

North East Adventure Tourism Consumer Research, 2020



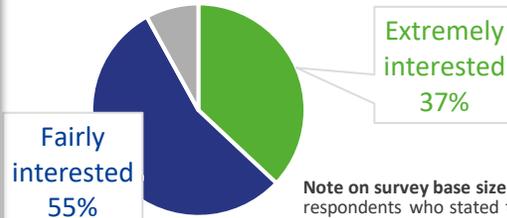
Hillwalking

Hillwalking represents up to 92% of the adventure tourism market

Hillwalking



MARKET SHARE



92% of the adventure holiday market are interested in taking part in hill walking during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 294 respondents who stated that they were extremely interested in participating in this activity.

Key features:

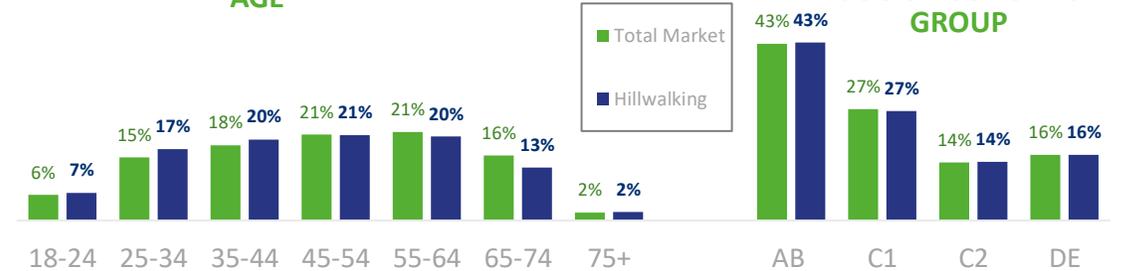
- A broad age and lifestage profile but predominantly more affluent socio-economic groups.
- Scenery, wildlife, a range of terrains and being able to connect with nature whilst getting fit and healthy is important to his group.
- Many in this group are members of a conservation organisation such as the National Trust, NTS, RSPB and Wildlife Trusts. Online resources are used when planning walking trips.

Who are they?

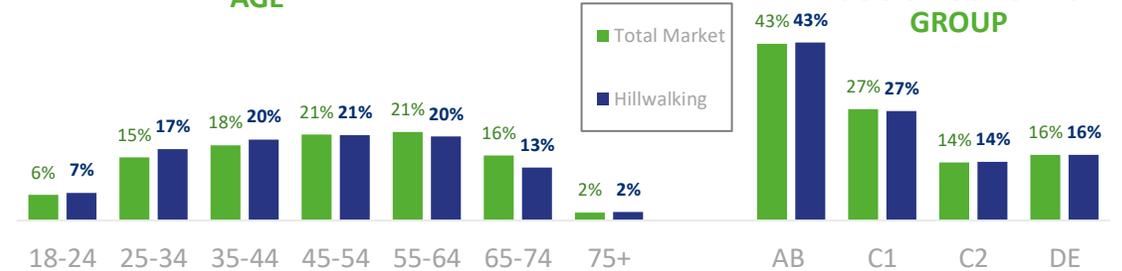
Given the wide appeal of this activity to much of the adventure holiday market the profile of hillwalkers is similar to the overall market:

- A wide spread of age groups – 58% between 25 and 54.
- 35% have children under 18 in household (vs 29% in total market)
- Mainly more affluent ABC1s (70%) – a much higher percentage than in the general population (56% across the UK).
- 67% are in the VisitScotland Adventure Seeker segment (vs 53% total market)

AGE



SOCIO-ECONOMIC GROUP



Holiday goals and decision drivers

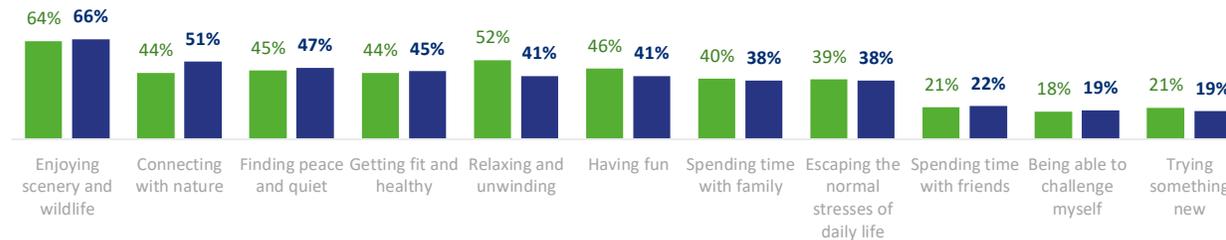
Compared to the overall market this group are more likely to seek the following from an adventure holiday:

- Enjoying scenery and wildlife, connecting with nature, getting fit and healthy.

The 5 most important factors when choosing a destination are:

- Attractive scenery, nature and wildlife to watch, overnight accommodation catering for people doing activities, mountainous and hilly landscapes, lakes lochs and mountains.

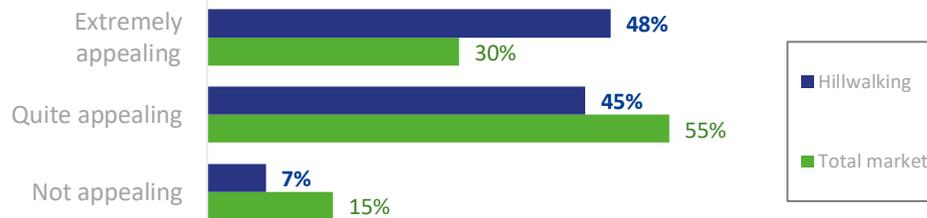
BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



Aberdeenshire is attractive to this market with the wildlife and access to the Cairngorms National Park particularly appealing

Aberdeenshire appeal

APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)

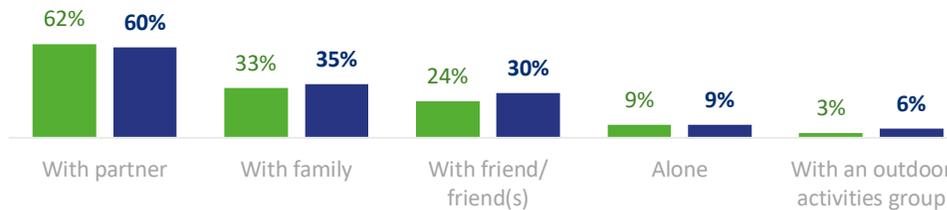


Compared to the overall market this group are more likely to state that:

- Aberdeenshire is an extremely appealing destination for around half (48% vs 30% total market).
- For this group the top 5 appealing aspects of Aberdeenshire are:
 - Wildlife (64%)
 - Access to Cairngorms National Park (57%)
 - Long coastline (53%)
 - Local food and drink to sample (50%)
 - Traditional towns and villages to visit (50%)

A visit to Aberdeenshire

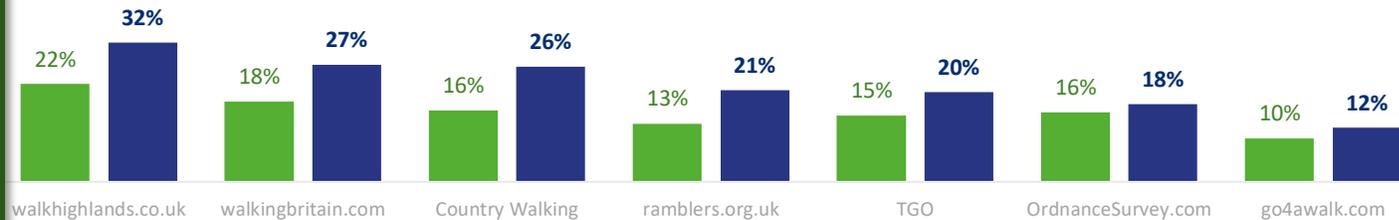
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- While most hillwalkers would visit Aberdeenshire with their partner (60%), compared to the total market they would be more likely to visit Aberdeenshire with friends.
- 94% would expect other members of their group to also take part in activities (63% definitely vs 48% average in total market).
- As well as hill walking a high percentage of this group express a desire to take part in other activities in future. In particular – long distance low level walks, walking on long distance trails, short distance low level walks and bird and wildlife watching.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- A third used walkinghighlands.co.uk and a quarter used walkingbritain.com. 26% read Country Walking.
- Instagram and Facebook usage is relatively high:
 - Instagram: 30% vs 26%
 - Twitter: 23% vs 22%
 - Facebook: 19% vs 16%
- Membership of activity and environmental organisations is higher than market averages – 30% National Trust or NTS, 16% RSPB, 14% in a Wildlife Trust. Also 6% are members of The Ramblers.

North East Adventure Tourism project:

North east Scotland is targeting sustainable growth in adventure tourism as part of the long-term economic recovery plan for the tourism sector. The NEAT steering group - comprising the funding partners – Opportunity North East (ONE) and Aberdeenshire Council – along with key stakeholders, VisitAberdeenshire, Scottish Enterprise and Developing Mountain Biking in Scotland - is working on a detailed business case to secure funding to invest in the project and realise the region's full adventure tourism potential. ONE and Aberdeenshire Council are co-funding the next phase of development of the NEAT project with support from VisitAberdeenshire.