

# North East Adventure Tourism Consumer Research, 2020



Hillwalking

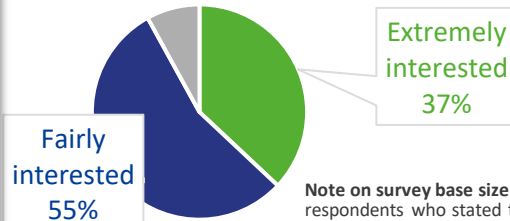


# Hillwalking represents up to 92% of the adventure tourism market

## 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:

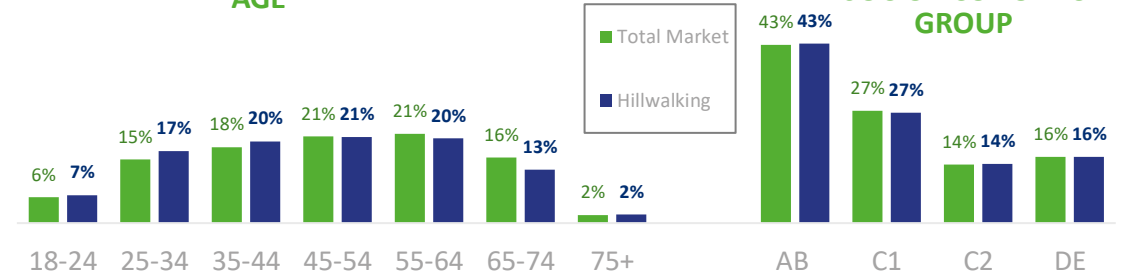
- A broad age and lifestage profile but predominantly more affluent socio-economic groups.
- Scenery, wildlife, a range of terrains and being able to connect with nature whilst getting fit and healthy is important to his group.
- Many in this group are members of a conservation organisation such as the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

## Who are they?

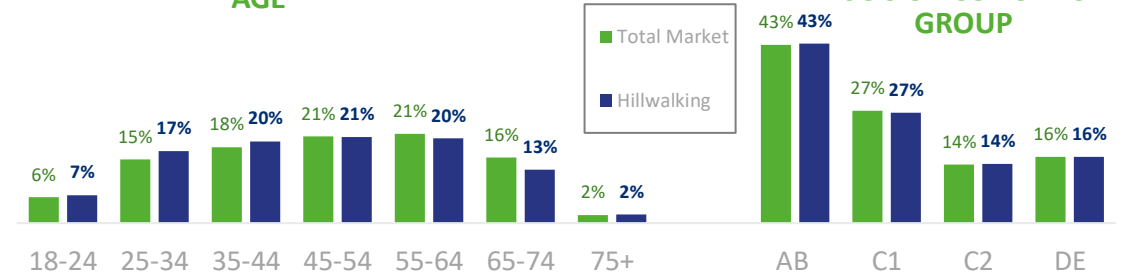
Given the wide appeal of this activity to much of the adventure holiday market the profile of hillwalkers is similar to the overall market:

- 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

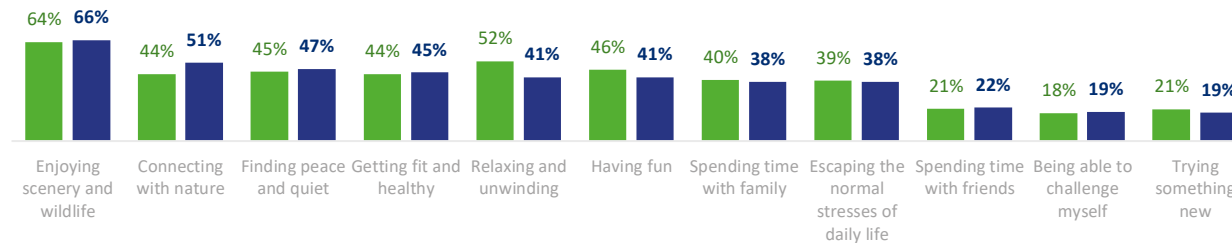
Compared to the overall market this group are more likely to seek the following from an adventure holiday:

- 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.

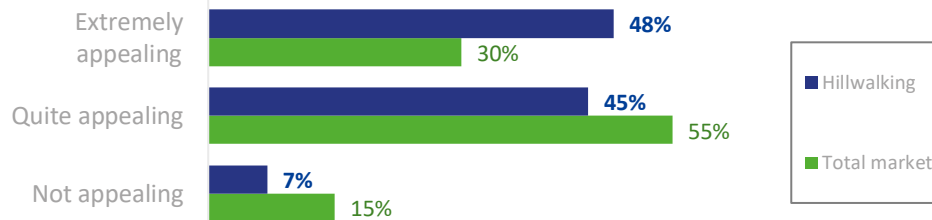
### BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



# 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)

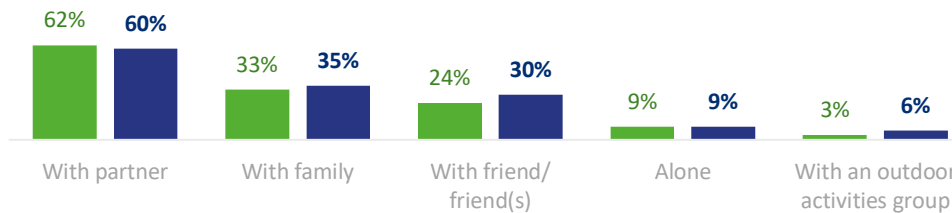


### Compared to the overall market this group are more likely to state that:

- 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

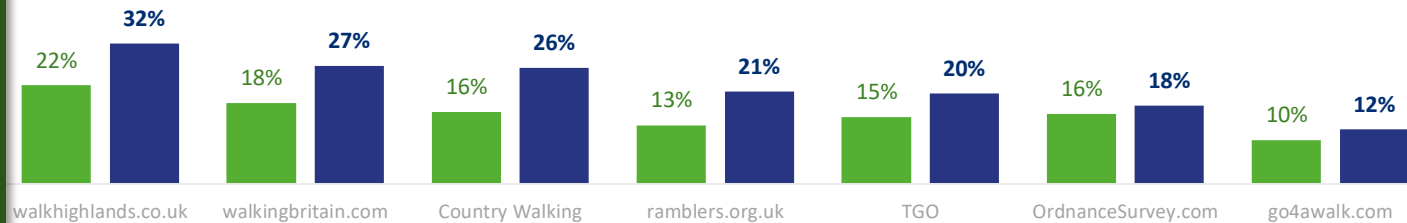
### PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- 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:



- 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.