

North East Adventure Tourism Consumer Research, 2020



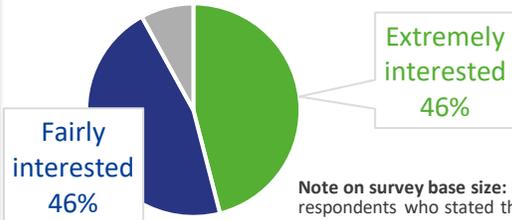
Long distance,
low level
walking

Long distance, low level walking represents up to 92% of the adventure tourism market

Long distance, low level walking



MARKET SHARE



92% of the adventure holiday market are interested in taking part in long distance, low level walks during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 368 respondents who stated that they were extremely interested in participating in this activity.

Key features:

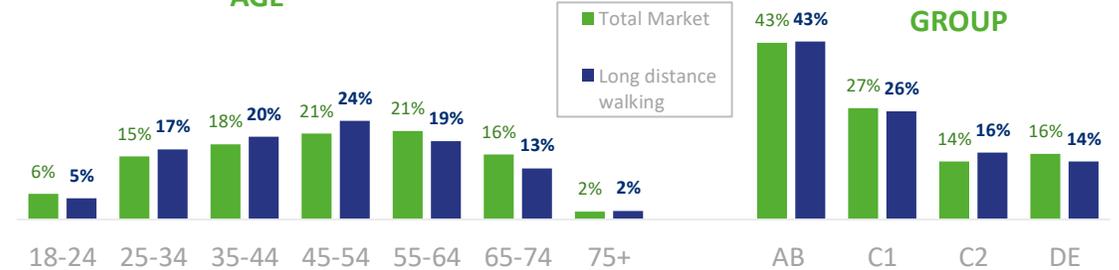
- A broad age profile with the highest share aged 45-54 and a third with children in household. A relatively affluent socio-economic profile with 69% in ABC1 groups.
- When planning an activity holiday and choosing a destination this group are attracted by scenery, nature and wildlife and opportunities to obtain health and wellbeing benefits.
- Members of this group are likely to use a number of walking related websites and/or to read Country Walking magazine. Almost 3 in 10 are members of the National Trust or NTS.

Who are they?

Given the wide appeal of this activity to much of the adventure holiday market, the profile of long distance, low level walkers is similar to the overall market:

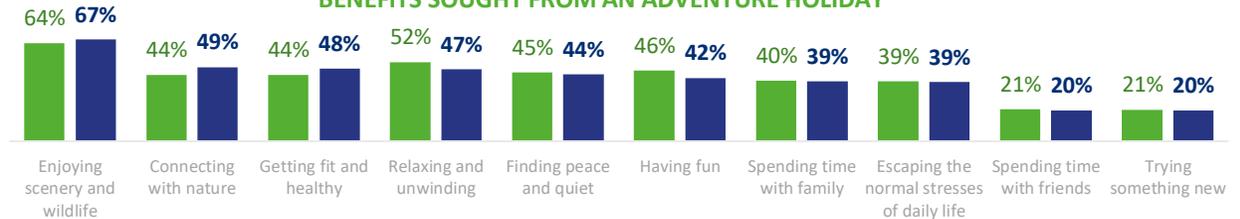
- A wide spread of age groups – the highest share aged 45-54 (24%)
- 33% have children under 18 in the household (vs 29% in total market)
- Mainly more affluent ABC1s (69%) – a much higher percentage than in the general population (56% across the UK).
- 61% are in the VisitScotland Adventure Seeker segment (vs 53% total market)

AGE



SOCIO-ECONOMIC GROUP

BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



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 and getting fit and healthy.

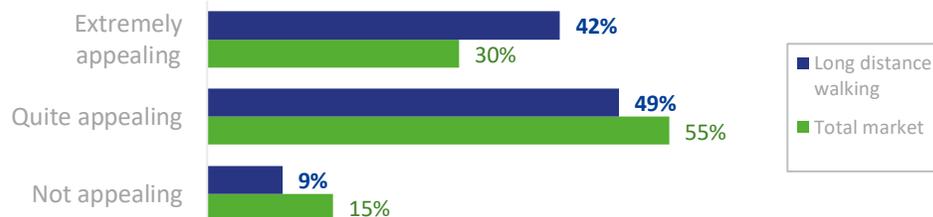
The 5 most important factors when choosing a destination are:

- Attractive scenery, nature and wildlife to watch, suitable accommodation, low level routes suitable for different abilities and lakes/lochs and rivers.

Aberdeenshire holds strong appeal for this market attracted by opportunities to see wildlife, visit the Cairngorms and traditional towns

Aberdeenshire appeal

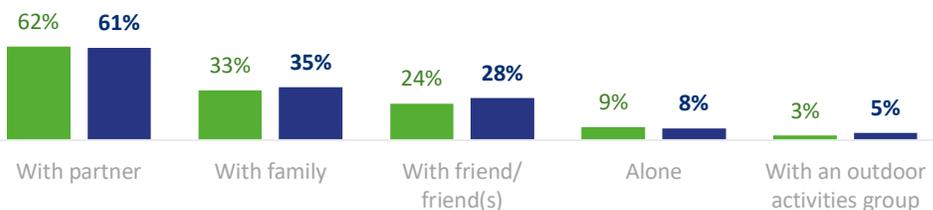
APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- Aberdeenshire is an extremely appealing destination for two-fifths (42% vs 30% total market).
- For them the top 5 appealing aspects of Aberdeenshire are:
 - Wildlife (63%)
 - Access to the Cairngorms National Park (55%)
 - Traditional towns and villages to visit (55%)
 - Local food and drink to sample (55%)
 - Long coastline (48%)

A visit to Aberdeenshire

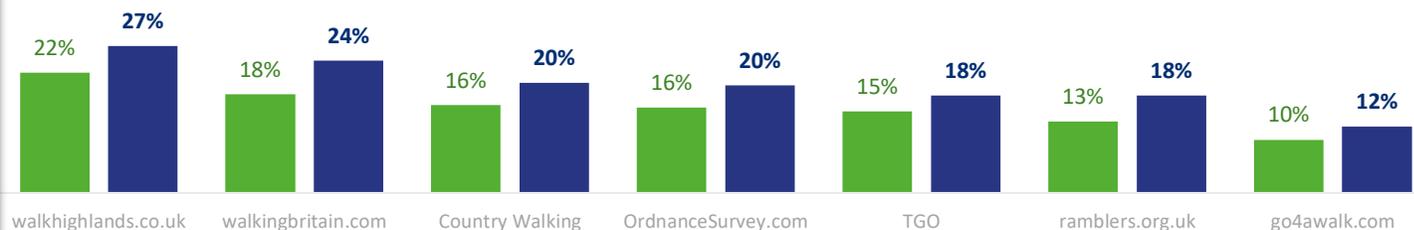
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- While those interested in long distance low level walks are more likely to visit with their partner a slightly higher percentage than the overall market would visit with friends.
- 94% would expect other members of their group to also take part in activities (58% definitely vs 48% average in total market).
- As well as long distance low level walking a high percentage of this group express a desire to take part in other activities in future. In particular hillwalking, shorter distance low level walks and walking on a long distance trail over several days.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- Members of this group were more likely to use a number of walking websites or read Country Walking.
- Social media usage was fairly low:
 - Instagram: 30% vs. 26%
 - Twitter: 23% vs. 22%
 - Facebook: 18% vs. 16%
- Membership of certain conservation and activity organisations was high – 28% National Trust/NTS, 14% RSPB, 13% a Wildlife Trust, 5% 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.