

North East Adventure Tourism Consumer Research, 2020

Pen Portraits

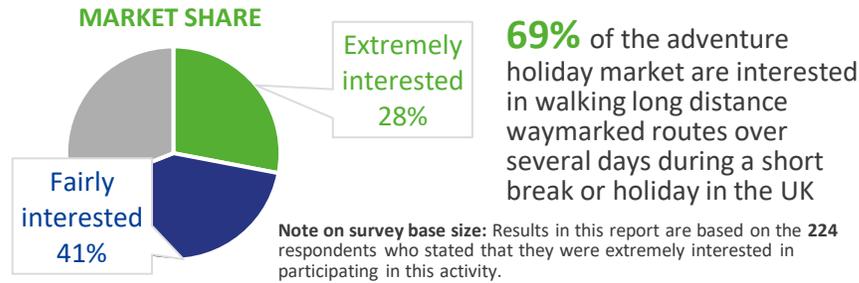


Walking a long
distance waymarked
route



Walking long distance waymarked routes represents up to 69% of the adventure tourism market

Waymarked long distance walking



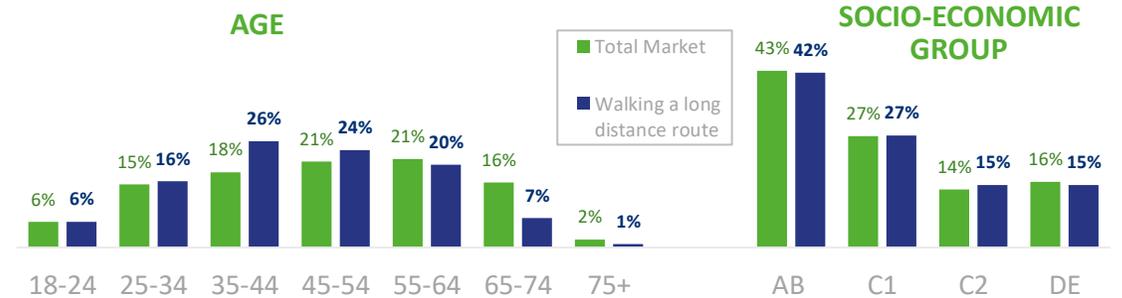
Key features:

- A mixed age profile but predominantly in the 35 to 54 age group and more likely than the overall market to have children at home. Also, in common with the overall market, a relatively affluent profile with 69% in ABC1 group.
- When planning a visit and choosing a destination, this group seeks a destination where they can achieve something and challenge themselves, using waymarked routes within a scenic backdrop. Visits are often taken in a group containing family and/or friends.
- Members of this group are also more likely to use walking related websites to plan trips and a large percentage read magazines such as Country Walking and TGO.

Who are they?

Compared to the overall market this group are more likely to be:

- Aged between 35-54 (50% vs 39% of total market)
- With children in household (39% v 29% total market)
- Mainly more affluent ABC1s (69% vs 56% of general UK population).
- 67% in the VisitScotland Adventure Seeker segment (vs 53% total market)



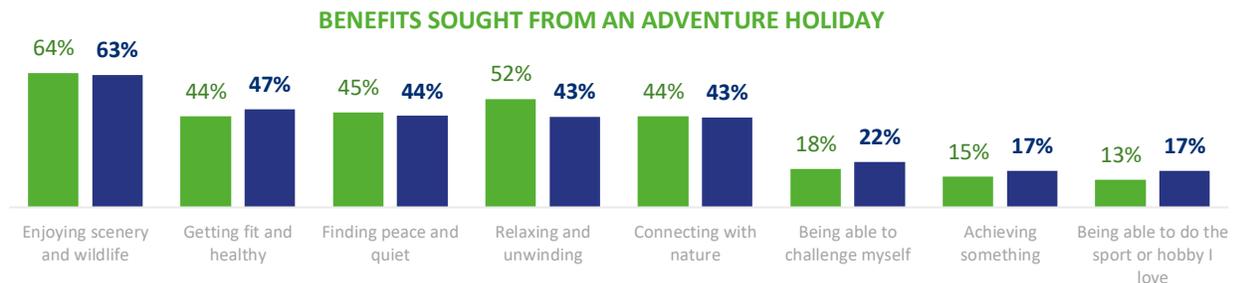
Holiday goals and decision drivers

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

- Getting, fit and healthy, being able to challenge themselves, achieving something, being able to do the sport or hobby they love.

The 5 most important factors when choosing a destination are:

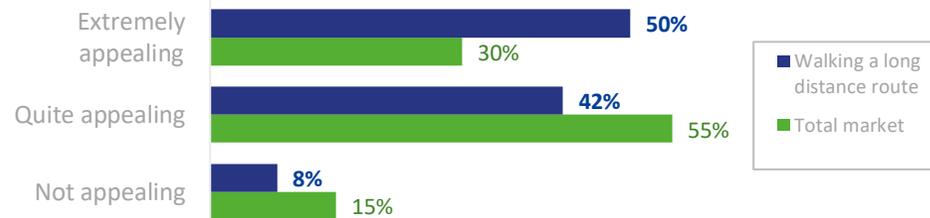
- Attractive scenery, nature and wildlife to watch, suitable overnight accommodation, lakes/lochs and rivers, low level routes suitable for different abilities.



Aberdeenshire holds strong appeal for this market especially for families and groups of friends seeking fun challenges in nature

Aberdeenshire appeal

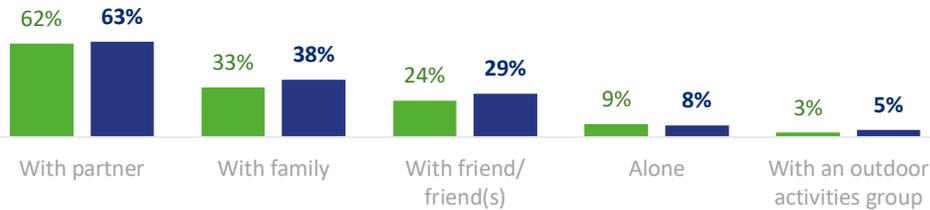
APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- Aberdeenshire is an extremely appealing destination to half of this group (50% vs 30% total market).
- For this group the top 5 appealing aspects of Aberdeenshire are:
 - Wildlife (65%)
 - Access to the Cairngorms National Park (60%)
 - Local food and drink (57%)
 - Long Coastline (54%)
 - Access to the Deeside Way and other signposted routes (54%)

A visit to Aberdeenshire

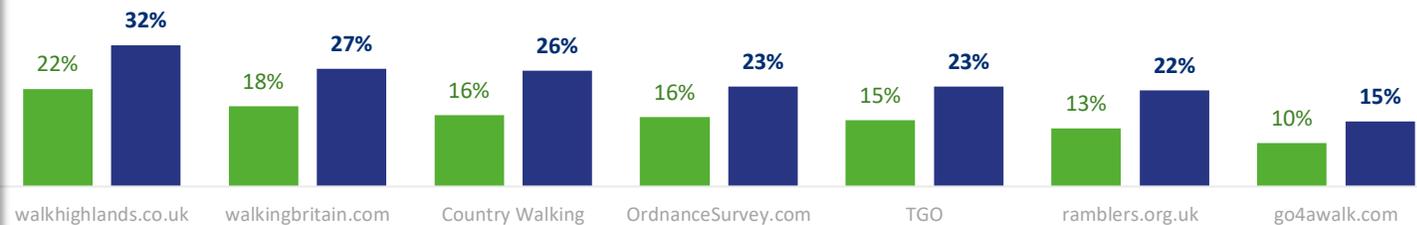
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the total market, those interested in this activity are more likely to expect to visit with family or friends or, for a small percentage, an outdoor activities group.
- 93% would expect other members of their group to also take part in activities (61% definitely vs 48% average in total market).
- As well as walking long distance routes a high percentage of this group express a desire to take part in other activities in future. In particular – hillwalking, longer distance low level walks and running or jogging in a natural place.

Media targeting

MAGAZINES AND PUBLICATIONS READ



- A third use walkhighlands.co.uk and over a quarter have read Country Walking or TGO magazine.
- Use of Instagram and Facebook was also high:



- Membership of activity and environmental organisations is relatively high – 28% are National Trust/NTS members, 17% RSPB, 6% The Ramblers and 5% Mountaineering Scotland.

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.