

North East Adventure Tourism Consumer Research, 2020



**Mountain
Biking**

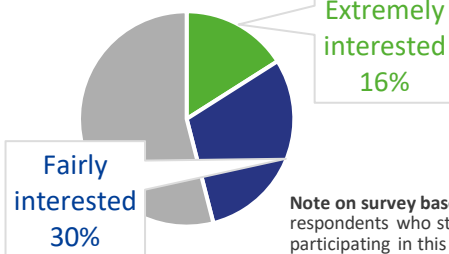


Mountain Biking represents up to 46% of the adventure tourism market

Mountain Bikers



MARKET SHARE



46% of the adventure holiday market are interested in taking part in Mountain Biking during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 128 respondents who stated that they were extremely interested in participating in this activity.

Key features:

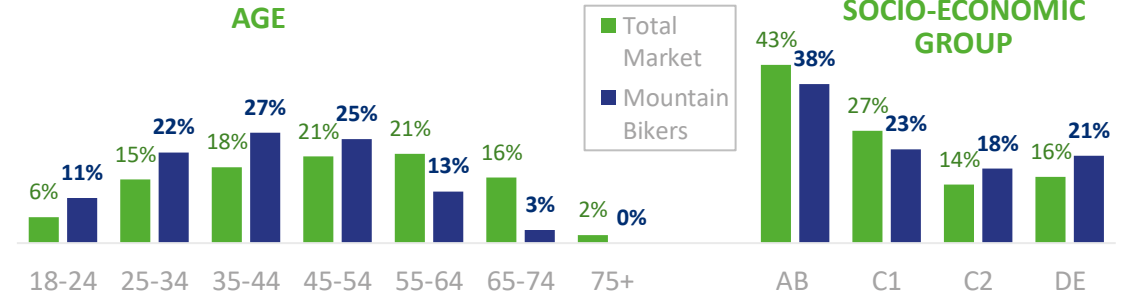
- A relatively young profile including pre-family and family life stages who seek fun and adventure in a natural setting. In common with the overall adventure market, a relatively affluent profile.
- Facilities are important to this market, in particular dedicated MTB trails. Beyond the natural product, being able to try local food and drink and visit local towns is also important.
- This market is active on social media and many read MTB and outdoor related publications and websites.

Who are they?

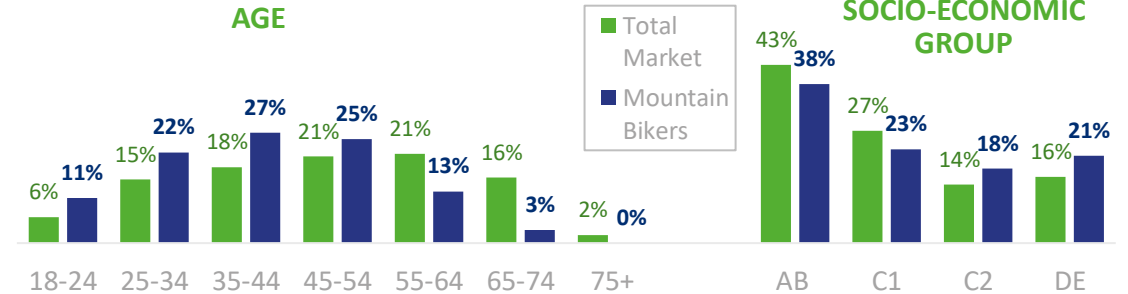
Compared to the overall market this group are more likely to be:

- Men (60% vs 52% total market)
- With children in household (52% v 29% total market)
- Aged under 55 (ranging from pre-family to family lifestage)
- Mainly more affluent ABC1s (61%) but a more varied socio-economic profile than the total adventure holiday market
- 75% in the VisitScotland Adventure Seeker segment (vs 53% total market)

AGE



SOCIO-ECONOMIC GROUP



Holiday goals and decision drivers

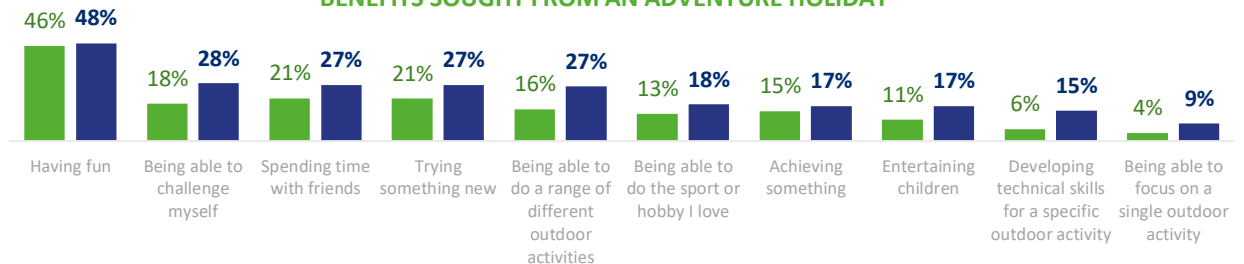
Compared to the overall market this group are more likely to seek the following from an adventure holiday:

- Having fun with family or friends, being able to do a range of outdoor activities, achieving something, challenging themselves and doing something new.

The 5 most important factors when choosing a destination are:

- Attractive scenery, suitable accommodation, nature and wildlife to watch, cycle paths away from roads and purpose built mountain bike trails.

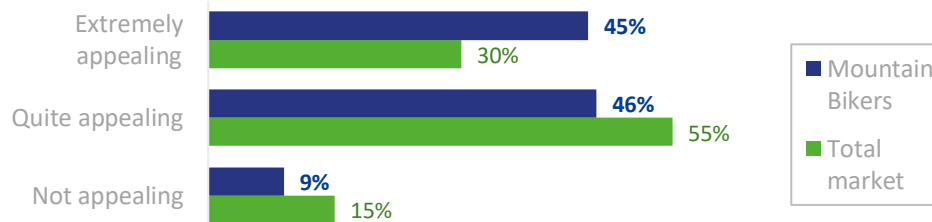
BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



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

Aberdeenshire appeal

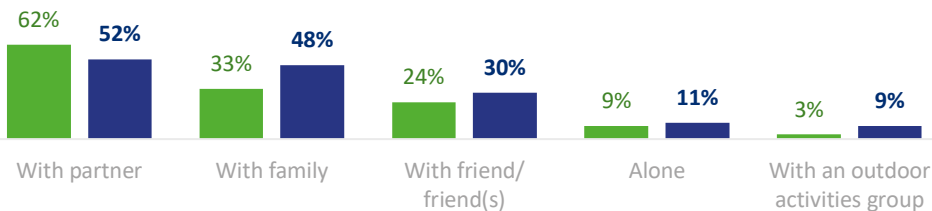
APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- Aberdeenshire is an extremely appealing destination for over 2 in 5 (45% vs 30% total market).
- For them the top 5 appealing aspects of Aberdeenshire are:
 1. Mountain bike trails to suit a range of abilities (55%)
 2. Access to the Cairngorms National Park (52%)
 3. Wildlife (52%)
 4. Local food and drink (52%)
 5. Traditional towns & villages to visit (52%)

A visit to Aberdeenshire

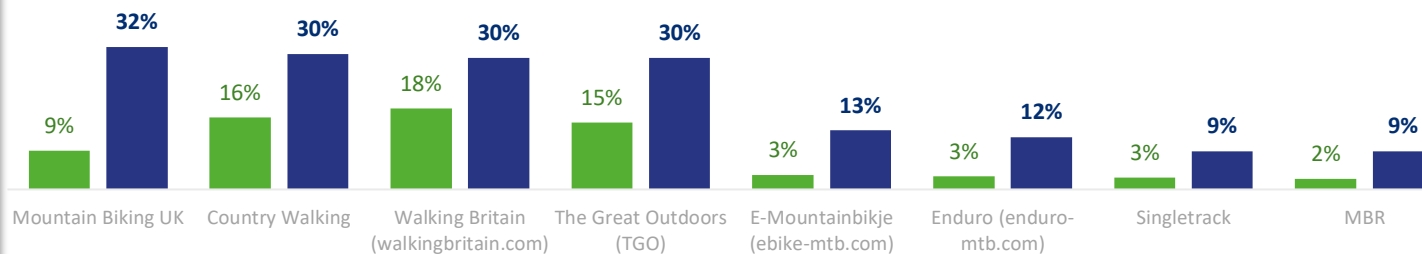
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the total market, those interested in mountain biking are more likely to visit Aberdeenshire with family or friends.
- 96% would expect other members of their group to also take part in activities (62% definitely vs 48% average in total market).
- As well as mountain biking a high percentage of this group express a desire to take part in other activities in future. In particular outdoor swimming, road cycling, kayaking, rock climbing or bouldering.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- A third read Mountain Biking UK and significant minorities read other MTB related publications.
- Social media usage is very high vs. the market average:



- Membership of activity and environmental organisations is also high – 20% in a Wildlife Trust, 16% Woodland Trust, 12% British Cycling, 8% CTC.

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.