

Adventure Tourism in North East Scotland

Consumer Insight Study – A Summary

Study undertaken by **56^o** DEGREE INSIGHT

Introduction

VisitAberdeenshire commissioned 56 Degree Insight to conduct market research to help inform development of the North East Adventure Tourism (NEAT) project. NEAT aims to increase the value of adventure tourism in the region over the next 5 to 10 years by delivering projects for new land and water based activities, developing new events and marketing the region as one of the UK's best adventure tourism destinations.

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.

This consumer research aimed to provide new insights which would address knowledge gaps relating to the adventure tourism market by answering the following key questions:

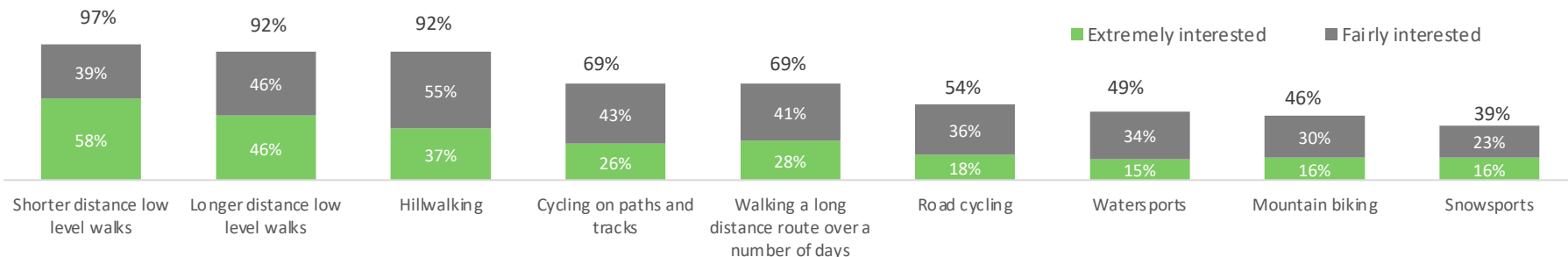
- What is the profile of the adventure tourism market?
- What would motivate this market to choose the North East for adventure tourism?

- How to communicate with this market in late 2020 and 2021 marketing campaigns?

Understanding the Target Market

The adventure tourism market covers a diversity of demographic groups with a range of different levels of engagement in outdoor activities, from those who prefer leisurely activities in a natural backdrop such as short walks and wildlife watching to those who take part in more extreme pursuits such as mountain biking, climbing or watersports. As illustrated below, while almost everyone in the market is interested in taking part in walking during a domestic short break or holiday in the UK, levels of interest in other activities are more focused within the population.

Figure 1 - Interest in taking part in outdoor activities during a short break or holiday in the UK



The vast majority of members of the adventure tourism market are in the more affluent ABC1 socio-economic groups (71% vs 56% of GB population). However, as illustrated opposite, the gender, age and lifestyle profile of those interested in certain activities varies somewhat (see Figure 2).

Reaching the Target Markets

Members of this market tend to use a mix of online resources, social media and magazines to seek information and inspiration when planning to take part in outdoor activities:

Figure 3 – Sources used for information and inspiration

Websites:

walkhighlands.co.uk – 22%
walkingbritain.com – 18%
ordnancesurvey.com – 16%
ramblers.org.uk – 13%

Social Media Accounts followed:

Instagram – 26%
Twitter – 22%
Facebook – 16%
You Tube

Magazines:

Country Walking – 16%
TGO – 15%
Mountain Biking UK – 9%

Engagement with all of these sources is particularly high amongst those with an interest in the most adventurous pursuits, in particular mountain biking and hillwalking.

Figure 2 - Key demographic traits of potential visitors by activities of interest

	Short distance, low level walks	Longer distance, low level walks	Hillwalking	Long distance waymarked route	Road cycling	Mountain biking	Watersports	Snowsports
Gender	Mixed	Mixed	Mixed	Mixed	Men	Men	Women	Mixed
Age	55 and over	35 to 54	25 to 54	35 to 54	25 to 44	25 to 44	18 to 34	18 to 34
Lifestage	Empty Nester	Varied	Family	Family	Family	Family	Family	Pre- Family

Social media accounts followed include Bear Grylls, Chris Packham, Danny MacAskill, David Attenborough, Fiona Outdoors, The Walkers Wife, Julia Bradbury and Steve Backshall.

Adventure Holiday Considerations

In general, when adventure holidays are taken, the most important benefits sought across all activity participants are scenery, relaxation, and fun. However, as shown in Figure 4, the benefits sought vary between those interested in

taking part in different activities with, for example, scenery of more importance to walkers while having fun was of more importance to cyclists, mountain bikers and those interested in water or snowsports.

Benefits sought also vary by place of residence with Scots more likely to seek peaceful and quiet places to relax and unwind while more of those from the North of England want to try something new and escape the normal stresses of daily life.

Figure 4 - What visitors seek from the adventure tourism experience

Short distance, low level walks	Longer distance, low level walks	Hillwalking	Long distance waymarked route
Enjoying scenery and wildlife, connecting with nature.	Enjoying nature and wildlife, connecting with nature, getting fit and healthy, relaxing and unwinding.	Enjoying scenery and wildlife, connecting with nature, getting fit and healthy.	Getting, fit and healthy, being able to challenge themselves, achieving something, being able to do the sport or hobby they love.
Road cycling	Mountain biking	Watersports	Snowsports
Having fun, spending time with family, being able to challenge themselves and developing skills for a specific activity.	Having fun, spending time with family or friends, achieving something, challenging themselves and doing something new.	Having fun, spending time with family or friends, trying something new, being able to do a range of activities, being able to challenge themselves & developing technical skills.	Having fun, trying something new, spending time with friends, being able to challenge themselves, being able to try a range of activities

When choosing a destination, scenery is the most important factor by far while nature and wildlife, overnight accommodation, local food and drink, access by car and the availability of routes to walk or cycle on are also key. However as illustrated opposite, there are some clear variations in the motivations and drivers influencing choices amongst those interested in different activities (see Figure 5 opposite).

While Northern Scotland is a very appealing adventure holiday destination for both short break and longer holidays amongst both Scots and those from Northern England, when asked to name potential destinations in Scotland, Aberdeenshire tends to be less frequently mentioned than other destinations such as the Highlands, Argyll and Loch Lomond. Addressing this knowledge gap and making the area more front of mind will be key to its success.

Opportunities for growth

When promoted with a short description and images, levels of appeal in Aberdeenshire increase significantly from the baseline when the area is included within a wider list of Scottish regions. This difference illustrates the scale of potential when awareness of the area is increased (Figure 6 opposite).

Across the adventure tourism market as a whole, the most commonly provided reasons for rating Aberdeenshire as appealing are as follows:

- Scenery, beautiful countryside and views (28%)
- The wide variety of outdoor activities (21%)
- The coast, including beaches and harbours (8%)
- Good walks and walking routes (7%)

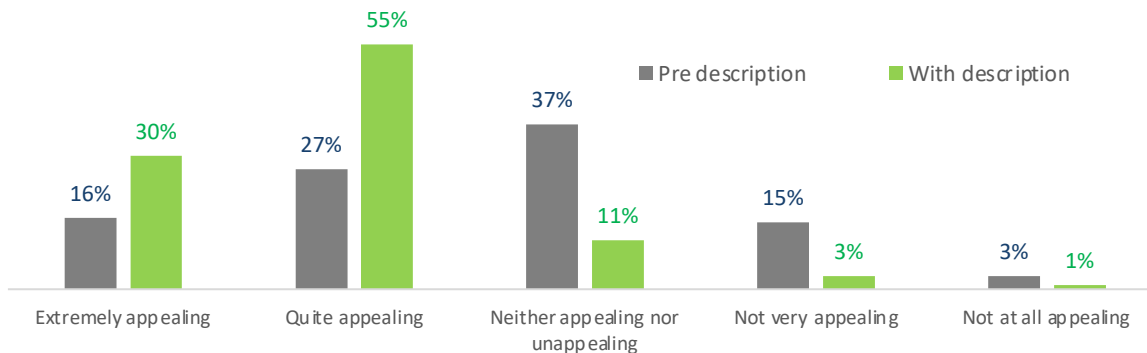
Figure 5 – Top 5 factors driving adventure tourism destination choices

Short distance, low level walks	Longer distance, low level walks	Hillwalking	Long distance waymarked routes
<ol style="list-style-type: none"> 1. Attractive scenery 2. Nature and wildlife to watch 3. Low level routes suitable for different abilities 4. Suitable overnight accommodation 5. Lakes/lochs and rivers 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Nature and wildlife to watch 3. Suitable overnight accommodation 4. Low level routes available for different abilities 5. Lakes/lochs and rivers 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Nature and wildlife to watch 3. Suitable overnight accommodation 4. Mountainous and hilly landscapes 5. Lakes, lochs and rivers 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Nature and wildlife to watch 3. Suitable overnight accommodation 4. Lakes/lochs and rivers 5. Low level routes suitable for different abilities
Road cycling	Mountain biking	Watersports	Snowsports
<ol style="list-style-type: none"> 1. Attractive scenery 2. Nature and wildlife to watch 3. Suitable overnight accommodation 4. Cycle paths away from busy roads 5. Lakes, lochs and rivers 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Suitable overnight accommodation 3. Nature and wildlife to watch 4. Cycle paths away from busy roads 5. Purpose built mountain bike trails 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Suitable overnight accommodation 3. Nature and wildlife to watch 4. Lakes/lochs and rivers 5. Beaches 	<ol style="list-style-type: none"> 1. Attractive scenery 2. Suitable overnight accommodation 3. Winter sports facilities 4. Nature and wildlife to watch 5. Lakes/lochs and rivers

- Ease of access to the area/ close to home (7%)
- The diverse landscape and terrain (7%).

Other factors found to appeal the most include the area's diversity of wildlife, local food and drink, traditional towns and villages to visit and access to the Cairngorms National Park.

Figure 6 – Appeal of Aberdeenshire – pre and post-description



However, for the minority who would not consider Aberdeenshire for an adventure holiday, certain aspects make the area unappealing. This includes a perception that it is too far away to travel to, a preference for other places in Scotland and worries about the weather.

Considering how different factors appeal to different activity groups is important. As illustrated opposite in Figure 7, while certain factors such as seeing wildlife appeal to most groups, other aspects are of more significance to particular activity groups.

The area's perceived strengths also varies by place of residence with Scots more likely to be attracted by opportunities to visit distilleries and craft breweries and hills and mountains to climb while those living in the North of England are more likely to be attracted by traditional towns and villages to visit.

With many of the area's perceived strengths reflecting the aspects of destinations which most often sought when planning adventure holidays, it is important they are at the forefront of marketing communications. Thus raising awareness of the region and what it has to offer.

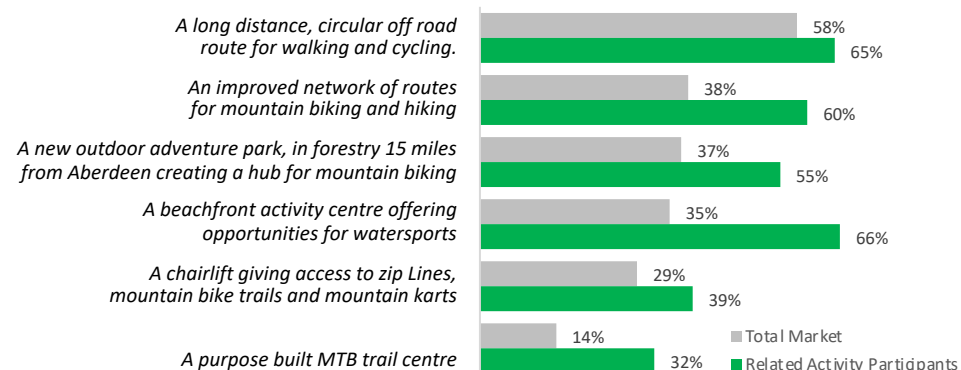
Developing the adventure tourism product

When presented with a range of potential new developments (Figure 8), the most popular idea across the overall market was the provision of a long distance, circular off-road route for walking and cycling. A number of other ideas also received high levels of support, particularly amongst those who were interested in taking part in related activities – including 66% of those with an interest in watersports keen to see the development of a beachfront activity centre and 60% keen to see an improved network of routes for mountain biking & hiking.

Figure 7 – Top 5 aspects of Aberdeenshire which make it appealing for adventure tourism

Short distance, low level walks	Longer distance, low level walks	Hillwalking	Long distance waymarked routes
<ol style="list-style-type: none"> 1. Wildlife (64%) 2. Traditional towns and villages to visit (54%) 3. Local food and drink to sample (53%) 4. Access to the Cairngorms National Park (52%) 5. Historic places to visit (47%) 	<ol style="list-style-type: none"> 1. Wildlife (63%) 2. Access to Cairngorms National Park (55%) 3. Traditional towns and villages to visit (55%) 4. Local food and drink to sample (55%) 5. Long coastline (48%) 	<ol style="list-style-type: none"> 1. Wildlife (64%) 2. Access to Cairngorms National Park (57%) 3. Long coastline (53%) 4. Local food and drink to sample (50%) 5. Traditional towns and villages to visit (50%) 	<ol style="list-style-type: none"> 1. Wildlife (65%) 2. Access to the Cairngorms National Park (60%) 3. Local food and drink to sample (57%) 4. Long Coastline (54%) 5. Access to the Deeside Way and other signposted routes (54%)
Road cycling	Mountain biking	Watersports	Snowsports
<ol style="list-style-type: none"> 1. Local food and drink to sample (59%) 2. Wildlife (57%) 3. Traditional towns and villages to visit (55%) 4. Access to the Cairngorms National Park (51%) 5. Long coastline (46%) 	<ol style="list-style-type: none"> 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 to sample (52%) 5. Traditional towns & villages to visit (52%) 	<ol style="list-style-type: none"> 1. Long coastline (66%) 2. Wildlife (65%) 3. Local food and drink to sample (54%) 4. Traditional towns and villages to visit (52%) 5. Access to Cairngorms National Park (51%) 	<ol style="list-style-type: none"> 1. Local food and drink to sample (56%) 2. Skiing and snowboarding centres (50%) 3. Wildlife (50%) 4. Long coastline (48%) 5. Access to the Cairngorms National Park (46%)

Figure 8 – Developments that potential visitors would like to see in the Aberdeenshire area



Find out more

This summary provides the key findings from this important research.

To find out more contact insights@visitabdn.com

Survey approach: 802 online interviews were completed between 3rd and 9th August 2020, with an equal split between residents of Scotland (excluding Aberdeenshire) and the North of England (north of Leeds/Manchester). To ensure representative coverage of the adventure tourism market within these areas, a series of screening questions were used to ensure that all respondents were interested in taking a holiday or short breaks to destinations north of the central belt in Scotland where the main purpose of the trip would be walking, cycling, mountain biking or watersports.