

# North East Adventure Tourism Consumer Research, 2020



Road cycling

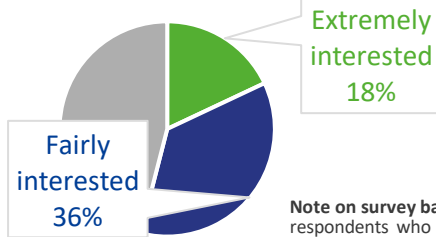


# Road cycling represents up to 54% of the adventure tourism market

## Cycling on roads



### MARKET SHARE



**54%** of the adventure holiday market are interested in taking part in cycling on roads during a short break or holiday in the UK

**Note on survey base size:** Results in this report are based on the 146 respondents who stated that they were extremely interested in participating in this activity.

### Key features :

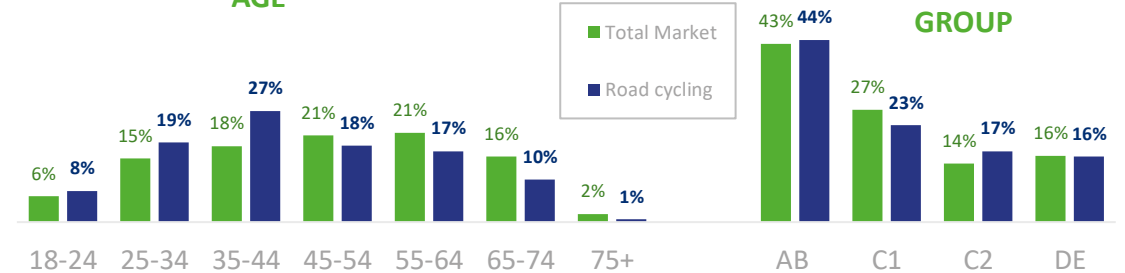
- More likely to be men and aged between 25 and 44. Reflecting the wider adventure tourism market, mainly in the affluent ABC1 social classes.
- Top motivations for this group are having fun, socialising and challenging themselves. Scenery, suitable accommodation and cycle paths influence destination choices.
- Members of this market are often interested in a range of outdoor activities and seek information and inspiration from various online and print sources. A significant minority are members of cycling related membership organisations.

## Who are they?

### Members of this group are more likely to be:

- Men (62% vs 52% total market)
- Aged between 25 and 44 (46% vs 34% total market)
- In family lifestage (38% children at home v 29% total market)
- In more affluent ABC1 social classes (67%)
- 71% in the VisitScotland Adventure Seeker segment (vs 53% total market)

### AGE



### SOCIO-ECONOMIC GROUP

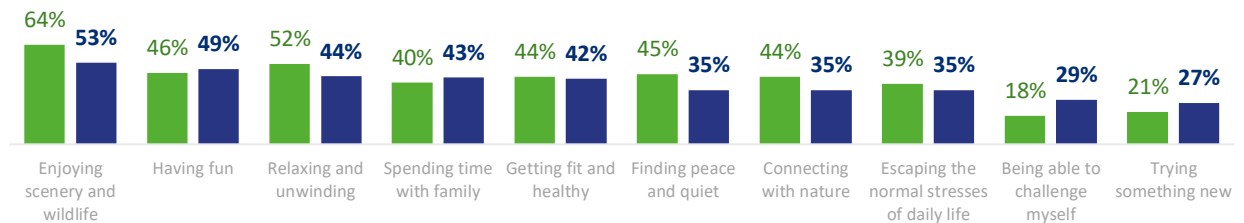
### Compared to the overall market this group are more likely to seek the following from an adventure holiday:

- Having fun, spending time with family, being able to challenge themselves and trying something new.

### The 5 most important factors when choosing a destination are:

- Attractive scenery, nature and wildlife to watch, overnight accommodation catering for people doing outdoor activities, cycle paths away from busy roads and lakes/lochs and rivers.

### BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY

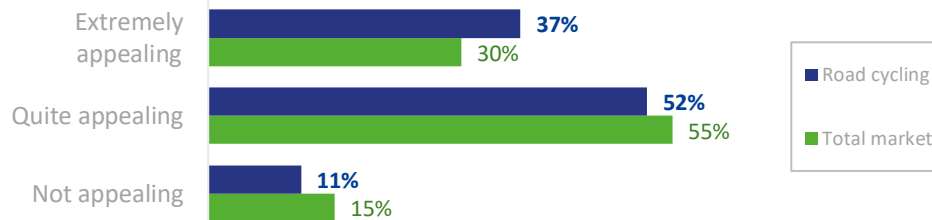


## Holiday goals and decision drivers

# People interested in road cycling tend to also enjoy other outdoor activities and seek information and inspiration from a range of sources

## Aberdeenshire appeal

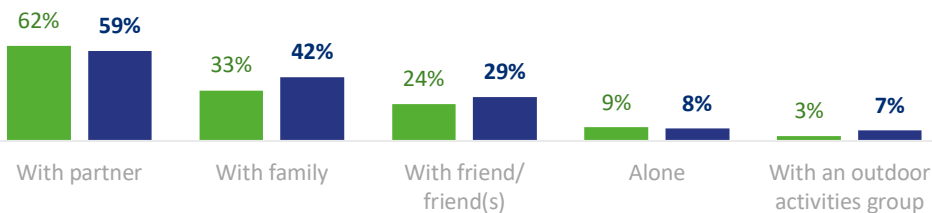
### APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- Aberdeenshire is an extremely appealing destination for 37% of this group (vs 30% total market).
- For this group the top 5 appealing aspects of Aberdeenshire are:
  - Local food and drink (59%)
  - Wildlife (57%)
  - Traditional towns and villages to visit (55%)
  - Access to the Cairngorms National Park (51%)
  - Long coastline (46%)

## A visit to Aberdeenshire

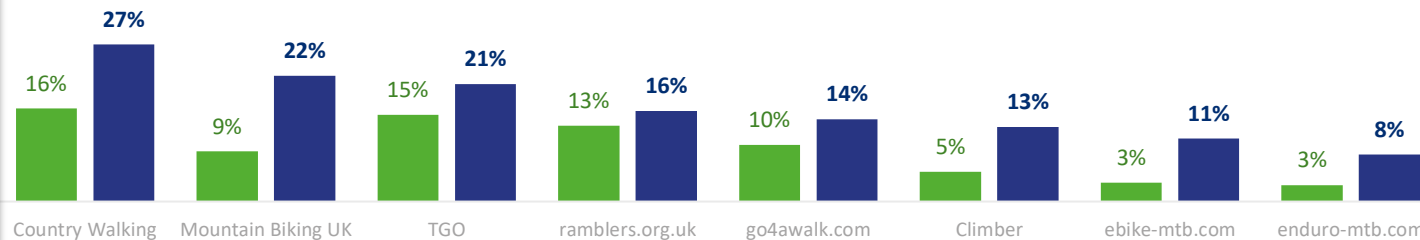
### PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the total market, those interested in road cycling are more likely to consider visiting Aberdeenshire in a range of group types – 42% would visit with family, 29% with friends and 7% would visit with an outdoor activities group.
- The vast majority (93%) would expect other members of their group to also take part in activities (60% definitely vs 48% average in total market).
- As well as road cycling a high percentage of this group express a desire to take part in other activities in future. In particular cycling off road on tracks, mountain biking and watersports.

## Media targeting

### OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- Reflecting their interest in a range of activities members of this group were likely to read a range of publications and use various websites.
- Social media usage was high vs. the market averages:
  - Instagram: 44% vs. 26%
  - Twitter: 31% vs. 22%
  - Facebook: 27% vs. 16%
- Membership of organisations is high – 26% are National Trust/NTS members, 18% Wildlife Trust, 10% British Cycling, 10% Cycling UK (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.