

North East Adventure Tourism Consumer Research, 2020



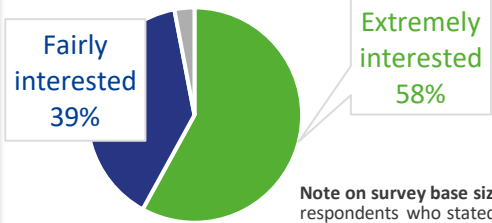
Short distance,
low level
walking

Short distance, low level walking represents up to 97% of the adventure tourism market

Short distance, low level walking



MARKET SHARE



97% of the adventure holiday market are interested in short distance, low level walking during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 467 respondents who stated that they were extremely interested in participating in this activity.

Key features:

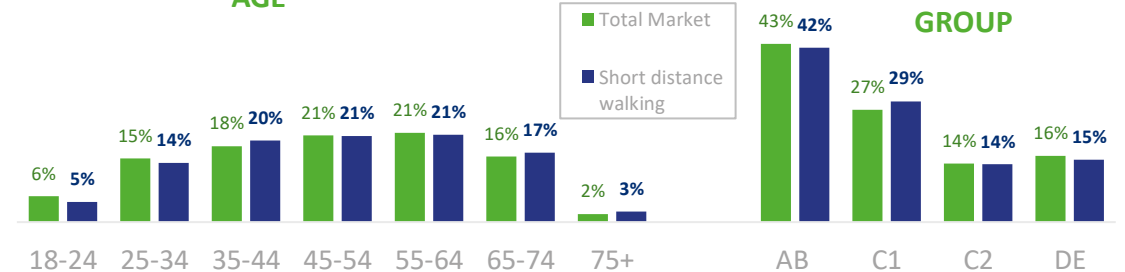
- A broad profile but including a high proportion of older age groups. Also, in common with the wider market, an upmarket profile with the majority in ABC1 groups.
- This group are attracted by scenery, nature and wildlife plus the opportunities to relax and unwind, have fun and find peace and quiet.
- Compared to other activity groups, members of this group tend to be less likely to read outdoor recreation related magazines or websites but many are members of the National Trust/NTS, RSPB or other conservation organisations.

Who are they?

Given the wide appeal of this activity to much of the adventure holiday market, the profile of those interested in short distance low level walks is similar to the overall market:

- A wide spread of age groups – including a higher share aged 55+ (41%) than seen for other activities.
- 30% have children under 18 at home (vs 29% in total market)
- Mainly more affluent ABC1s (71%) – a much higher percentage than in the general population (56% across the UK).
- Compared to some other activity groups, fewer are in the VisitScotland Adventure Seeker segment (55%).

AGE



Holiday goals and decision drivers

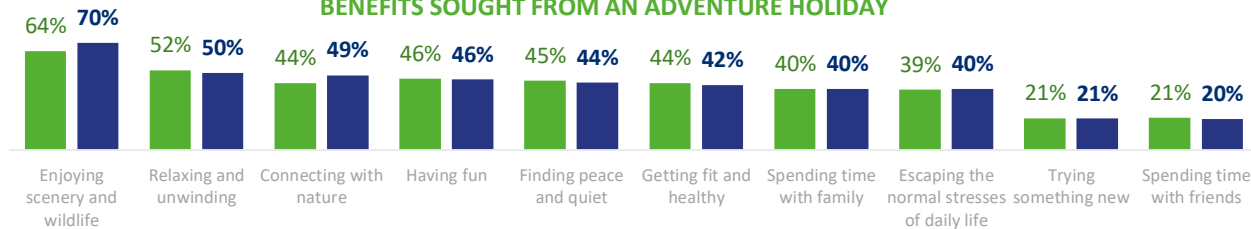
Compared to the overall market this group are more likely to seek the following from an adventure holiday:

- Enjoying scenery and wildlife, connecting with nature.

The 5 most important factors when choosing a destination are:

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

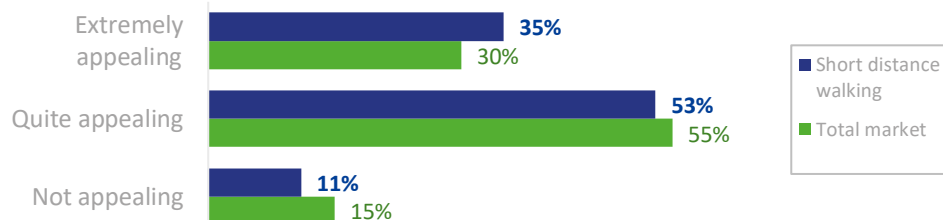
BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



Aberdeenshire appeals to this group for a range of reasons beyond outdoor activities including towns and historic places to visit

Aberdeenshire appeal

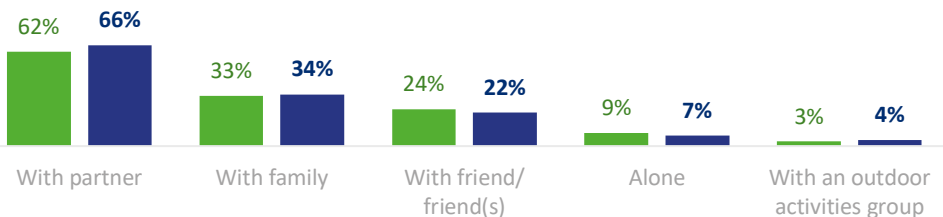
APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- 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:
 - Wildlife (64%)
 - Traditional towns and villages to visit (54%)
 - Local food and drink to sample (53%)
 - Access to the Cairngorms National Park (52%)
 - Historic places to visit (47%)

A visit to Aberdeenshire

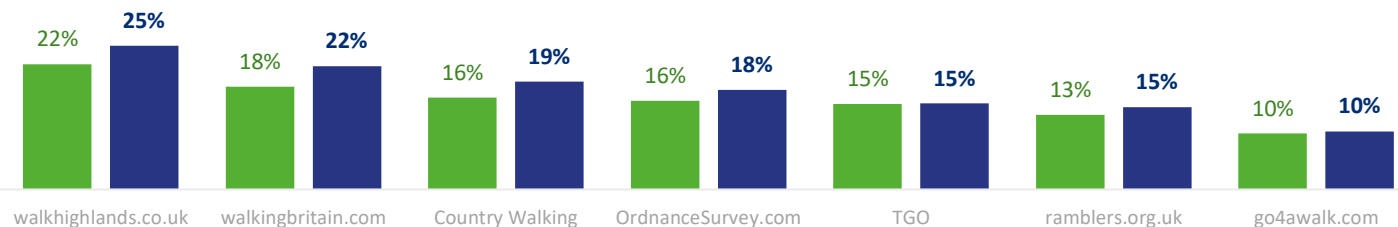
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the total market, those who take part in short, low level walks are more likely to take part with their partner and/or family.
- 91% would expect other members of their group to also take part in activities (55% definitely vs 48% average in total market).
- As well as short distance walks a relatively high percentage of this group express a desire to take part in other forms or walking in future including longer distance low level walks or hill walks.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- Media usage is broadly in line with the overall market. 25% had used walkinghighlands.co.uk.
- Social media usage is also relatively low:
 - Instagram: 30% vs. 26%
 - Twitter: 23% vs. 22%
 - Facebook: 19% vs. 16%
- However membership of conservation organisations is relatively high - 28% in National Trust or NTS and 13% in RSPB.

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.