

North East Adventure Tourism Consumer Research, 2020

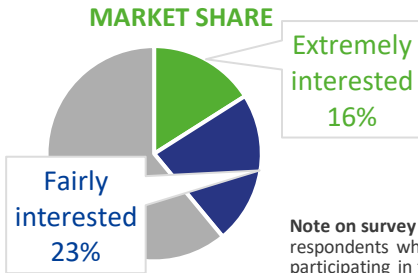


Snowsports



Snowsports represents up to 39% of the adventure tourism market

Snowsports



39% of the adventure holiday market are interested in taking part in snowsports during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 125 respondents who stated that they were extremely interested in participating in this activity.

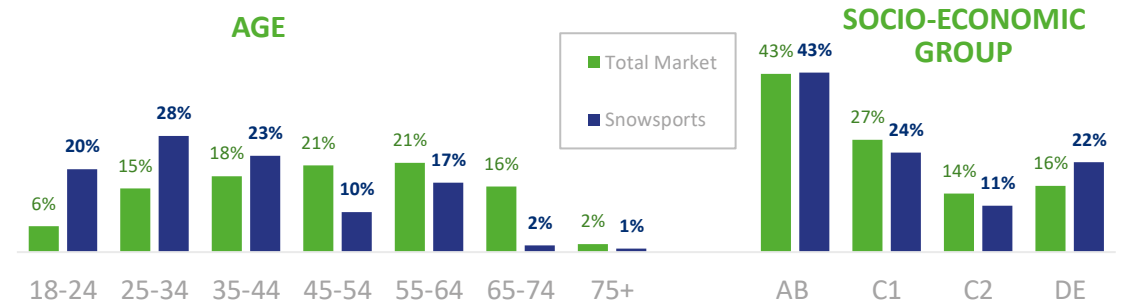
Key features:

- A young age profile but predominantly professionals in higher socio-economic groups.
- Visits are likely to be motivated by the desire to have fun, trying something new and spend time with family and friends.
- Scenery, accommodation suited to outdoor activity participants and winter sports facilities are important in destination choices. Local food and drink is also appealing when considering Aberdeenshire.
- Members of this group often also enjoy other outdoor activities including watersports and hillwalking. Many are readers of related magazines and websites.

Who are they?

Members of this group are particularly likely to be:

- Aged under 35 (48% v 21% total market)
- In the more affluent ABC1 social classes (67%)
- 67% in the VisitScotland Adventure Seeker segment (vs 53% total market)



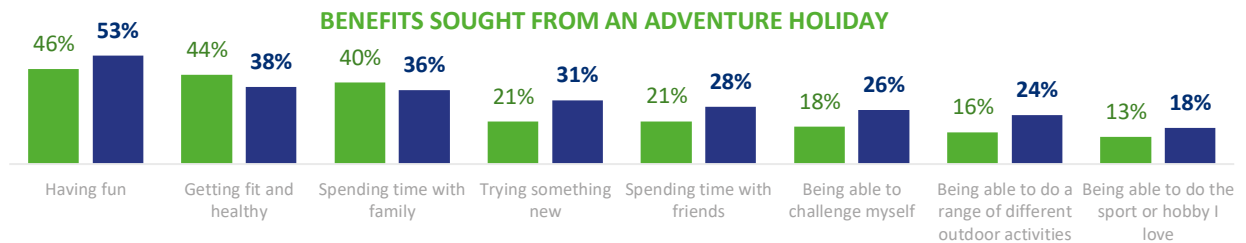
Holiday goals and decision drivers

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

- Having fun, trying something new, spending time with friends, being able to challenge themselves, being able to try a range of activities

The 5 most important factors when choosing a destination are:

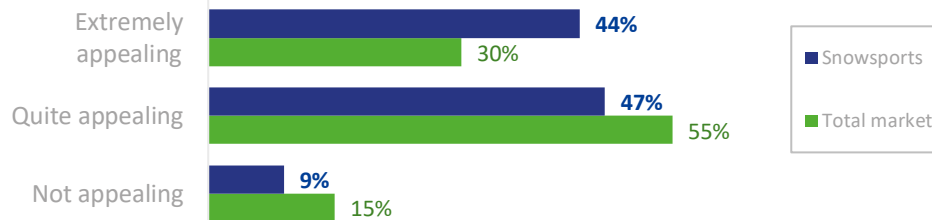
- Attractive scenery, suitable accommodation, winter sports facilities, nature and wildlife to watch, lakes/lochs & rivers.



The availability of snowsport centres, local food and drink and the Cairngorms National Park makes Aberdeenshire appealing for many

Aberdeenshire appeal

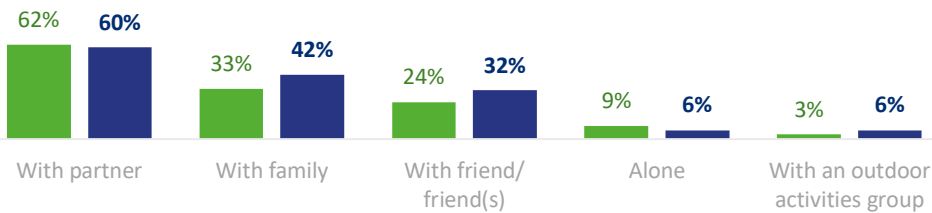
APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)



- Aberdeenshire is an extremely appealing destination for 44% of this group (vs 30% total market).
- For this group the top 5 appealing aspects of Aberdeenshire are:
 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%)

A visit to Aberdeenshire

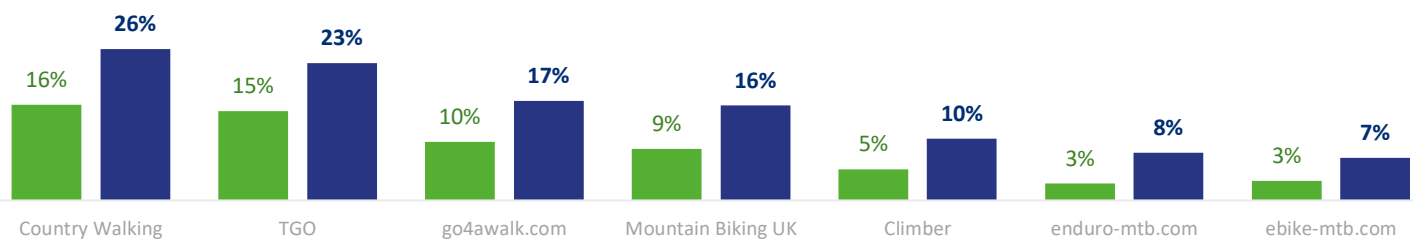
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the overall market those interested in snowsports are more likely to expect to visit with family or friends.
- 93% would expect other members of their group to also take part in activities (58% definitely vs 48% average in total market).
- As well as snowsports a high percentage of this group express a desire to take part in other activities in future, in particular watersports and hillwalking.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- Reflecting their interest in other activities members of this group were likely to read outdoor activity magazines and use related websites.
- Social media is also high:
 - Instagram: 40% vs. 26%
 - Twitter: 46% vs. 22%
 - Facebook: 25% vs. 16%
- Membership of activity and environmental organisation is also relatively high – 26% are National Trust/NTS members, 17% a Wildlife Trust, 14% Woodland Trust.

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.