

North East Adventure Tourism Consumer Research, 2020



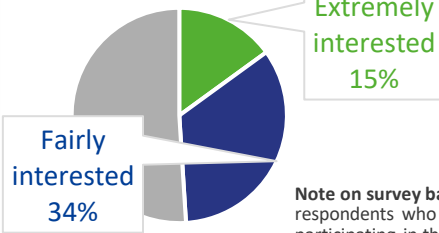
Watersports

Watersports represents up to 49% of the adventure tourism market

Watersports



MARKET SHARE



49% of the adventure holiday market are interested in taking part in watersports during a short break or holiday in the UK

Note on survey base size: Results in this report are based on the 119 respondents who stated that they were extremely interested in participating in this activity.

Key features:

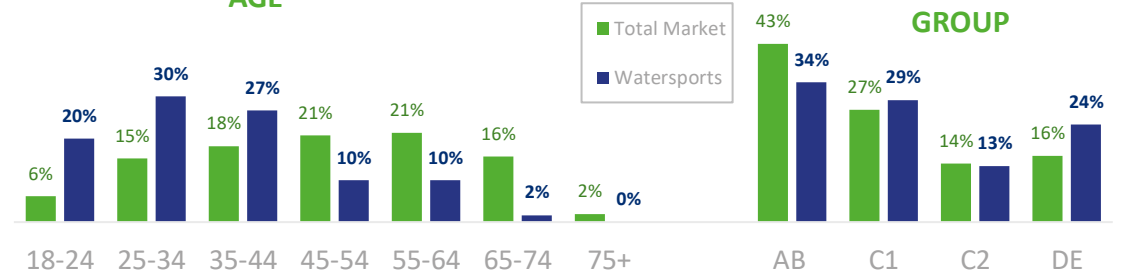
- More likely to be women and aged between 18 and 34. While largely ABC1s, a wider range of social classes than most other activity groups.
- Having fun with family and friends, trying something new and developing skills is important to this group. Kayaking and paddle boarding are the watersports most likely to appeal to them.
- They are active on social media and many read outdoor related publications and websites.

Who are they?

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

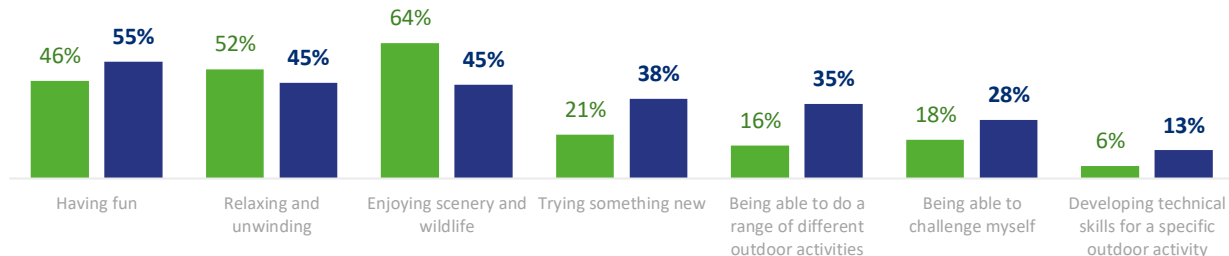
- Women (62% vs 48% total market)
- With children in household (52% v 29% total market)
- Aged under 35
- Mainly more affluent ABC1s (63%) but a more varied socio-economic than total adventure holiday market
- 75% in the VisitScotland Adventure Seeker segment (vs 53% total market)

AGE



SOCIO-ECONOMIC GROUP

BENEFITS SOUGHT FROM AN ADVENTURE HOLIDAY



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, trying something new, being able to do a range of activities, being able to challenge themselves, developing technical skills.

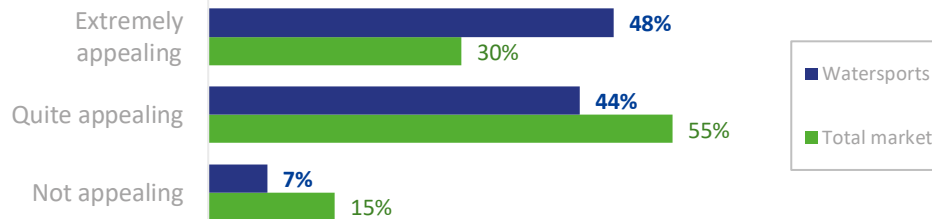
The 5 most important factors when choosing a destination are:

- Attractive scenery, suitable accommodation, nature and wildlife to watch, lakes/lochs and rivers and beaches.

Aberdeenshire holds strong appeal for this market with the long coastline and wildlife most likely to attract

Aberdeenshire appeal

APPEAL OF ABERDEENSHIRE FOR OUTDOOR ACTIVITIES (PROMPTED)

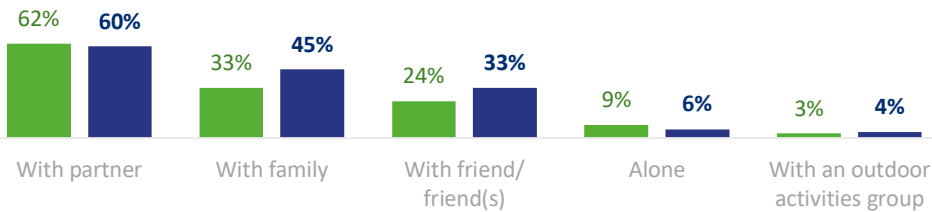


Compared to the overall market this group are more likely to state that:

- Aberdeenshire is an extremely appealing destination (48% vs 30% total market).
- For them the top 5 appealing aspects of Aberdeenshire are:
 1. Long coastline (66%)
 2. Wildlife (65%)
 3. Local food and drink (54%)
 4. Traditional towns and villages to visit (52%)
 5. Access to Cairngorms National Park (51%)

A visit to Aberdeenshire

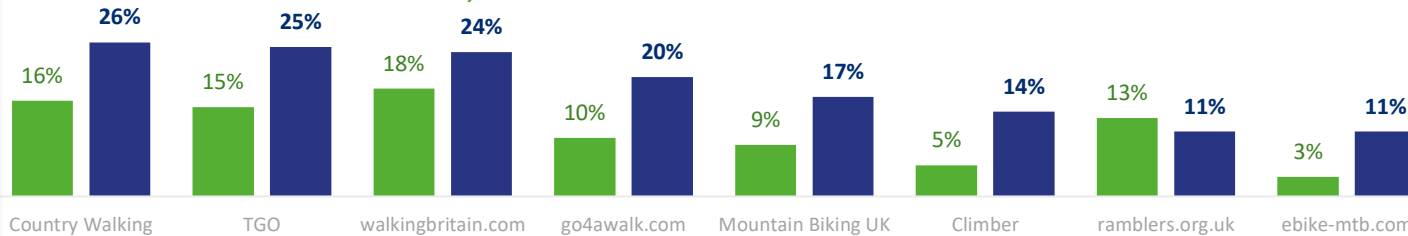
PARTY COMPOSITION ON A VISIT TO ABERDEENSHIRE



- Compared to the total market, those interested in watersports are more likely to visit Aberdeenshire with family or friends.
- 93% would expect other members of their group to also take part in activities (63% definitely vs 48% average in total market).
- A high percentage of this group express a desire to take part in a range of activities in future including – outdoor swimming, kayaking, paddleboarding and other activities out of the water including horseriding and snowsports.

Media targeting

OUTDOOR RECREATION MAGAZINES, WEBSITES AND SOCIAL MEDIA



- Reflecting the range of activities of interest to this group they obtain information from a range of related magazine and websites.
- Social media usage is high vs. the market average:
 - Instagram: 48% vs. 26%
 - Twitter: 44% vs. 22%
 - Facebook: 29% vs. 16%
- Membership of activity and environmental organisations is also high – 18% are members of a Wildlife Trust, 18% The 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.