

**56°**  
DEGREE  
INSIGHT



**Aberdeenshire**  
Scotland

## Perceptions and Sentiment Research

### Debrief

11<sup>th</sup> March 2022



# Resetting your strategy to grow tourism in Aberdeen and Aberdeenshire as we emerge from the Coronavirus pandemic

- Launched in March 2018, VA's strategy for tourism set out your ambitions for the sector until 2023 with an overall aim to grow visitor spend to £1 billion by 2023.
- This ambition would be achieved through a combination of product development to ensure that experiences reflect those sought by visitors and effective marketing to inspire and attract visitors.
- The strategy was built upon tourism trends and an understanding of what visitors to Aberdeen and Aberdeenshire sought the time.
- However, the Coronavirus pandemic has had a huge impact on the tourism sector and the factors which consumers take into account when considering potential destinations and planning future trips.
- **This research has aimed to provide a detailed and updated picture of the views of potential visitors to Aberdeen and Aberdeenshire as we emerge from the pandemic.**

# Key questions to answer to help you to plan your strategy to 2023 and beyond

**Overall research aim: To obtain a detailed understanding of the views and opinions of potential visitors to Aberdeen and Aberdeenshire to inform plans for future marketing and product development.**

## How have consumers changed their attitudes towards travel and tourism since before the pandemic?

- Experiences during this period and how this varied from pre-pandemic.
- Expectations for 2022
- Motivations and barriers influencing destination choices
- Changes in the appeal of particular holiday types

## How do consumers perceive Scotland and Aberdeenshire?

- Levels of awareness/experiences
- What perceptions are based on
- Focus on Aberdeen and Aberdeenshire
- Comparisons with other UK destinations.

## What is consumer sentiment towards Scotland and Aberdeenshire?

- A more detailed understanding of consumer opinions of Scotland generally and Aberdeen & Aberdeenshire specifically.
- Pre-existing views
- Prompted views
- Testing destination appeal

## What actions need to be taken to achieve growth ambitions?

- What VA and the industry need to do to make the destination more appealing
- Reactions to concepts for marketing and product development

# A qualitative approach to obtain an in depth understanding of opinions amongst residents of Scotland and the North of England

- Six Zoom focus groups attended by five respondents undertaken between 14<sup>th</sup> and 23<sup>rd</sup> February
- A mix of demographics and places of origin were included (Scotland and North of England were included)
- 40:60 mix of previous visitors to area and those who would not reject the idea of visiting

## Group 1

### Scotland (Glasgow)

#### Pre family and young family

- 3x with primary school age children
- 2x in relationship with no children
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

## Group 2

### Scotland (Glasgow)

#### Older family and younger empty nester

- 2x with secondary school age children
- 3x aged 50 - 60 no children at home
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

## Group 3

### Scotland (Edinburgh)

#### Older empty nesters

- 5 x Aged 60+ no children at home
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

## Group 4

### England (York/Leeds)

#### Older empty nesters

- 5 x Aged 60+ no children at home
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

## Group 5

### England (York/Leeds)

#### Older family and younger empty nester

- 2x with secondary school age children
- 3x aged 50 - 60 no children at home
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

## Group 6

### England (Manchester)

#### Pre family and young family

- 3x with primary school age children
- 2x in relationship with no children
- 2x been to Aberdeenshire on holiday before in last 3-4 years
- 3x not been but would not reject idea

# Attitudes towards international and domestic travel



# With lifting restrictions and diminishing concerns most are looking forward to overseas holidays

## The return of international travel...

After 2 years of restrictions there is high demand to travel overseas including some cancelled trips, originally booked in 2019, finally being taken

For most the main motivation is relaxation in guaranteed sunshine to a 'beach destination' in Europe

Most often the draw is the ease of doing very little but some also seek to discover new places, try new food and and obtain the authentic destination experience

However, some concerns remain over international travel remain esp. uncertainty over vaccine rules, rates of Covid 19 in some countries and emerging worries around war in Ukraine – this means some are still 'waiting to see' how matters develop before making firm plans

*"..Italy for the sun..because we've not been able to get away and we'd like a little hot sunshine."*

*"I work hard so I just want to chill by a pool"*

*"everyone's free again!"*

*"guaranteed sunshine and outdoor pool I'm not freezing in!"*

*"I don't want to make plans and have them cancelled again...I'll just wait and see."*



# The UK continues to appeal but more so for secondary breaks and holidays

## The rediscovery of UK destinations...

Domestic short breaks and holidays broadly fall into two categories:

- **Regular trips which are repeated** e.g. a favorite dog friendly holiday cottage, family tradition to stay in a caravan or annual trip to see a show, visiting friends/family
- **Trips to discover and explore new places** – a break from the norm, recharging batteries, indulging, eating good food, returning to childhood haunts – rural and city breaks.



During the pandemic more time than normal has been spent (re)discovering destinations in the UK and positive experiences mean that many would like to continued to see more of their country.

However future domestic holidays are likely to be secondary breaks with main holiday(s) taken overseas



Trips in the UK come with the expectation that weather may be poor – especially if travelling north

This concern is 'de-risked' by taking shorter breaks (including shorter travel time) – this also means that the time off work is less of a commitment with annual leave 'saved' for international trips

When travelling with children more planning is needed for domestic trips to ensure that there is plenty to do, especially if the weather is poor – this tends to be less of a concern for overseas trips



In their own words...





# Opinions of Scotland as a short break and holiday destination

# Scotland is well regarded as a holiday destination but levels of awareness and perceptions vary, particularly by place of residence

## Residents of Scotland

### In general...

- Highest awareness and most experience of a range of places
- Detailed knowledge of destinations including favourite places revisited regularly
- Predominantly interested in rural destinations to escape day to day life – Loch Lomond, Aviemore, Dumfries and Galloway, Argyll, Orkney.
- Generally see Scotland as easy to get around

## North of England residents

### In general...

- Lower awareness or views based on one or two trips to specific places (including work trips)
- Both rural and city destinations appeal – references of breaks to Edinburgh, Glasgow, Inverness, St Andrews, Highlands, West Coast, NC500

*“it was very remote, we were the only people there.”*

*“I went up on the train up the East Coast and loved the little villages and rolling fields.”*

*“It’s beautiful in the sunshine and beautiful in the rain.”*

*“You don’t feel like you’re in the UK.”*

*“I would just like to go to places in Scotland I’ve not been to before.”*

### A wide range of positive images come to mind....

**Scenic**

**Remote**

**Historic**

**Natural**

**Traditional**

**Rugged**

**Freedom**

**Discovery**

**Quirky**

**Beaches**

**Unspoilt**

# A wide range of Scottish destinations visited or of interest were mentioned but often with a focus on 'honey pot' locations

*“Something in Scotland that’s easy to get to. Seen a lot of the West Coast so I might try East Coast to see something different – maybe **Aberdeen**.”*

*“I’d like to do the **islands in the west** as much as possible in the next few years, **St. Andrews** and the **Highlands** – there are so many different places to try to visit...you forget how diverse our own country is!”*

*“**Orkney** is phenomenal, there’s so much interesting stuff on Orkney”*

*“**Loch Lomond**’s not that far but it feels like it’s different...another world.”*

*“In America they do Route 66 but in Scotland they do **Route 500** – that’s on our bucket list.”*

*“The **Highlands** to visit the beautiful beaches and stuff.”*

*“If we go to **Scotland** it’s normally autumn time with the leaves changing, it’s just beautiful, but the weather’s terrible!”*

*“We camped on **Mull** before we had the kids – it’s just stunning, there’s no place like it.”*

*“I’ve got happy memories of going to **Scotland** as a child – staying in a little cottage in the middle of nowhere – I want to give my kids happy memories too”*



# However, a number of common concerns make both Scots and residents of North of England hesitant when considering whether to take holiday or break in Scotland



## The weather

An expectation of poor weather at any time of year and the further north you go the worse!

Some will come prepared and carry on, others feel it can ruin a holiday - especially for families.

*"The weather is a huge factor – you know you're going to get soaked every day."*



## Distance and time required

For N of England residents an issue in comparison to other domestic destinations. Especially for short breaks where excessive time travelling isn't desirable. Especially a concern for families.

*"it's about 4 hours drive so really you need a week up there to make it worthwhile."*



## Cost

An increasing concern for some life stages in the context of cost of living crisis. An acceptance that domestic holidays cost more.

*"The accommodation here is always much more expensive than it is overseas – it's a balance of convenience over cost"*



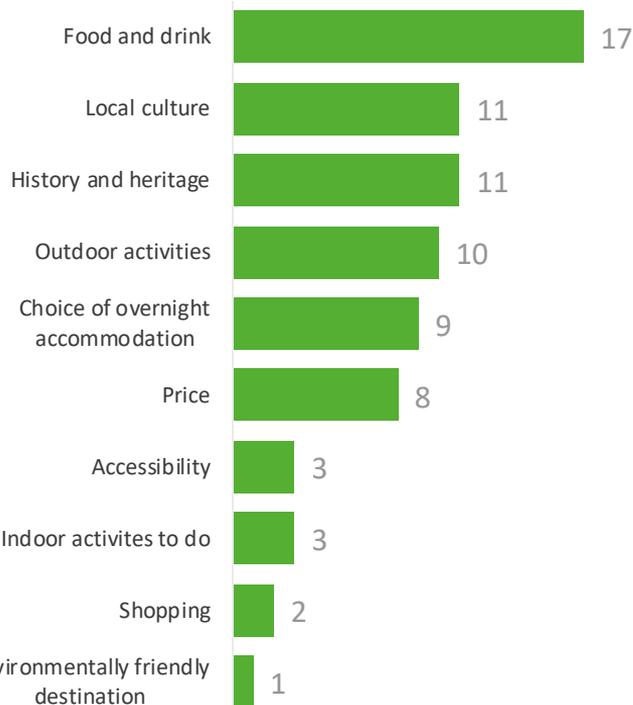
## Worries over things to do and amenities

With low awareness of destinations and perceptions of being 'traditional', concerns of a lack of places to eat, shops, attractions which are open.

*"As a tourist you want to stop for tea, coffee, lunch, etc. and these might not be there."*

# Rating importance of factors when choosing a Scottish destination – food, culture, heritage and outdoor activities are most important overall

Focus group poll 1 – what 3 factors would be most important if choosing a Scottish destination?



## Factors which tend to be most important...

### Food and drink



- Eating and drink is a key part of the experience – sometimes the highlight of the day!
- It can be more important in a destination with poorer weather
- Knowing about access to places to eat out and good local food is an important part of trip planning – including cooking for self.

### Local culture



- Aspects which make the area different, intertwined with all aspects of the experience
- Not just 'formal' culture such as performances/arts, also local people, food, traditions, etc.

### History and heritage



- Expectation that Scotland is 'full' of history wherever you go and this enriches experience
- Commented that information/interpretation is needed to take advantage of this

### Outdoor activities



- Type/intensity of activity which appeals varies between individuals.
- However, the **natural backdrop/scenery/wildlife** is a common appeal for all.

*"It brings the group together.. even if it's just bag of chips on the seafront."*

*"I'm always keen to find out what's going on...it's part of going somewhere becoming involved and supporting local businesses."*

# Accommodation and price vary in importance while environmental credentials are least important – at least on the surface

## Factors which vary in importance...

### Choice of accommodation



Vs



- Importance varies - from what this being makes or breaks the holiday to just seeking a bed for the night.
- In general, when activities or other aspects are the main feature of the trip the accommodation becomes less important.

*"I just like to stay somewhere nice. - I like to see it before we go, see where we are going online."*

### Price



- A general perception that holidaying in Scotland is not cheap and more expensive if a lot of driving is required.
- With poorer weather more money is spent on entertainment, eating out, etc.
- A particular issue for families.

*"We went away a couple of weeks ago as a family of 5. It is incredible how expensive it was..."*

### An environmentally friendly destination?



- Only selected by 1 respondent as one of the top 3 factors important to them if choosing a destination in Scotland.
- An assumption that this will be 'looked after' by the businesses you deal with.

*"I'd be surprised if the accommodation didn't mention sustainability."*

In their own words...



# Opinions of Aberdeen and Aberdeenshire as a short break and holiday destination



# Top of mind associations of Aberdeen and Aberdeenshire varied most significantly by previous experiences of visiting the area with Scots generally much more familiar than those living in the North of England



*"Hills, wildlife and the need for warm clothing."*

*"What pops in my head is the programme on TV with deep sea fishermen in Peterhead."*



*"I don't know why I've never been – probably because you get to Perth and you always just go straight ahead at the roundabout."*

*"you do think 'cold granite city'"*

*"although I wasn't that taken by Aberdeen itself, places near it are beautiful"*



*"I don't really know what's in it that would make me want to go."*

**However, others had little or no associations at all with the area so could not respond...**

When shown an outline map of the area some were surprised at the scale of the area but others worried about the time needed to get there



### Pleasant surprises (esp amongst less familiar/ English):

- Larger than expected
- More coastline (a small number surprised that Aberdeen is by the sea)
- Extent inland esp. to Braemar, Ballater, Cairngorms

*"You forget that these places are in Aberdeenshire."*

*"When you add in the Cairngorms that puts a different perspective on it - fantastic."*

*"I'd love to go there – just to escape the city."*

### But also some further concerns raised (amongst North of England predominantly)...

- The location suggests a long drive from North of England (6 or 7+ hours?)
- Would require a break/overnight stop on the way.
- Train is appealing to get there but feeling that a car would be needed when in the area to explore.

# Asked to rank, the largest share of respondents associated the area as being rich in culture and heritage, beautiful and traditional

Focus group poll 2 – which 3 do you expect to best describe Aberdeen & Aberdeenshire as a destination



## Rich in culture and heritage

A range of associations but predominantly related to castles, villages, Balmoral but also for some fishing and the oil industry

*"Lots of castles, fishing culture – quite interesting stuff like that."*



## Beautiful

With a focus on the coast and countryside

*"It just felt dead Scottish when I was there!"*



## Traditional

Proud of its Scottishness, authentic - for some not as 'touristy' as some other areas

*"It's traditional as in proud. Not trying to be anything other than Scottish."*



## ...but also surprising

Having seen the map and heard from other respondents some expect to be surprised at what is to be found in the region and the variety it offers.

*"I'm optimistic that I'll be surprised!."*

# But while views towards the area are predominantly positive, a number of barriers and concerns exist

## Aberdeen city

(esp. for Scots)

A bit grim and gritty  
Windy  
Depressing  
Expensive due to oil  
Less to offer than other cities  
And/or the same as any other city

*"I spent quite a few evenings wandering about the city centre..before Covid everything was already closed down."*

## North =Cold?

(for Scots & English)

A feeling that it will be colder in this area than alternatives to the south such as Northumbria.

Weather is especially significant for families

*"I imagine bleak – hailstones in your face"*

## Less Touristy =No facilities?

(esp. for English)

Some concerns (perceived and experienced) that the region will have a lack of places to eat, accommodation, supermarkets, etc.

The negative of being traditional/ authentic.

*"Accommodation could be a problem in smaller towns and eating well in the evening could be problematic."*

## 'Riskier' than choosing a better known destination?

(esp. for English)

While a change of scene would be welcome, previously visited places which offer a similar product might be consider to be a safer bet

*"You never see any marketing for it."*

## Too difficult to get to?

(esp. for English)

While seen as relatively easy to most Central Belt Scots it is expected to be a long drive from North of England – for some too far for anything but a longer visit.

*"We went there by car but I can remember how long it took to get there and it was equally long going back down...it's quite a deterrent."*

*"You need a week there to justify 2 days of travelling."*

# Respondents were taken through a series of images representing the range of what is on offer to visitors to Aberdeen and Aberdeenshire

## Aberdeen City Break



City centre shops, bar and restaurants



Luxury hotels and fine dining



Aberdeen Science Centre



Old Aberdeen and historic sites

## History and Heritage



Historic villages



Historic properties



Balmoral



Castles

## Great Outdoors and Sightseeing



Rivers, woodland and mountains



Countryside



Beaches and dunes



Coastal towns

## Culture and Arts



Theatre



Galleries



Outdoor art/ murals



Local markets

## Adventure Activities



Hill Walking



Shorter, low level walks



Mountain biking



Water sports

# Reactions to the images and their description are predominantly positive

## A pleasant surprise

After seeing the images and hearing the description - almost all say that there's more to the area than they expected

*"Looking at those pictures just makes me want to go back and do more."*

*"It's not what I thought...it looks like the sort of place that me and my husband would go away to without the kids"*

BEEN BEFORE/  
MORE FAMILIAR WITH AREA

**A reminder of what the area has to offer – sometimes more than they remembered or realised**



NEVER BEEN/  
UNFAMILIAR WITH AREA  
(ESPECIALLY NORTH OF ENGLAND RESIDENTS)

**Excited to hear about somewhere new which they could explore**

*"I know it's somewhere I need to go!"*

Common factors are mentioned as areas of appeal ....

<b>Coastline</b>	<b>Countryside and mountains</b>	<b>Local food</b>	<b>Watersports</b>	<b>Different</b>
<b>Fishing communities</b>		<b>Inland villages</b>	<b>Diverse</b>	<b>Less touristy</b>

*"it's the corner of Scotland I've not visited and that's inexcusable."*

*"I just think romantic. The city stuff I'm less interested in because I live near bricks and mortar but the scenery the coast, the wild sea – just beautiful!"*

# While nearly all feel more inclined to visit after seeing the images, some have continuing reservations/practical concerns which need to be overcome



## The weather

The images look great but is it realistic?



## Better for a longer holiday (North of England)

But most save longer holidays for international trips



## Too far (North of England)

While somewhere new appeals...for those in England other destinations are much more convenient



## Need to know more about what's in the area

The images look great but need some substance/ detail about the area – amenities, itineraries, attractions.

Realistically these concerns could make many less likely to be converted from liking what the area offers to actively planning a visit



*"I need someone to join the dots for me!"*

In their own words...



**What actions need to be taken to achieve growth ambitions?**



## Proposed actions to drive growth

- **Raise awareness** – a key issue for all markets is a lack of appreciation of what is in the area – this ranges from almost no knowledge at all (esp. North of England) to knowledge of some but not all aspects and/or some misconceptions (esp. Scots) – **almost universally once consumers hear more about the area its appeal increases.**
- **Cut through by focusing communications on points of differentiation** – feedback suggests that a lot of advertising is seen for destinations but less so for Scotland and never for Aberdeen or Aberdeenshire. Future campaigns need to cut through this noise and gain attention by focusing on aspects that make the area different – the diversity on offer (coast and mountains/city and rural), Royal Connections, different/ authentic local culture, food and drink. **Give them a reason to come!**
- **‘Balancing’ Aberdeen and Aberdeenshire** – the coastal and rural aspects of the area tend to hold most appeal (especially for Scots) but the discussions uncovered opportunities to promote the less known aspects of Aberdeen (old city, university city, gastronomy) and/or to make the city a base for exploration (‘countryside by day, city by night’)
- **Promotion of the area’s appeals need to be supported by information to address practical concerns** e.g. around distance, amenities, things to do, itineraries
- **Where possible marketing needs to be differentiated for Scottish and North of England markets..**
  - Scots are more inclined (able) to take shorter breaks, more attracted to rural aspects, more likely to need to have misconceptions re. Aberdeen addressed.
  - North of England residents are more likely to need reassurance over distance/ practicalities/ amenities e.g. itineraries, alternatives to the long drive, lots to do indoors and out (potentially to justify a longer visit).

In their own words...

