

Consumer database survey

March 2022



industry.visitabdn.com

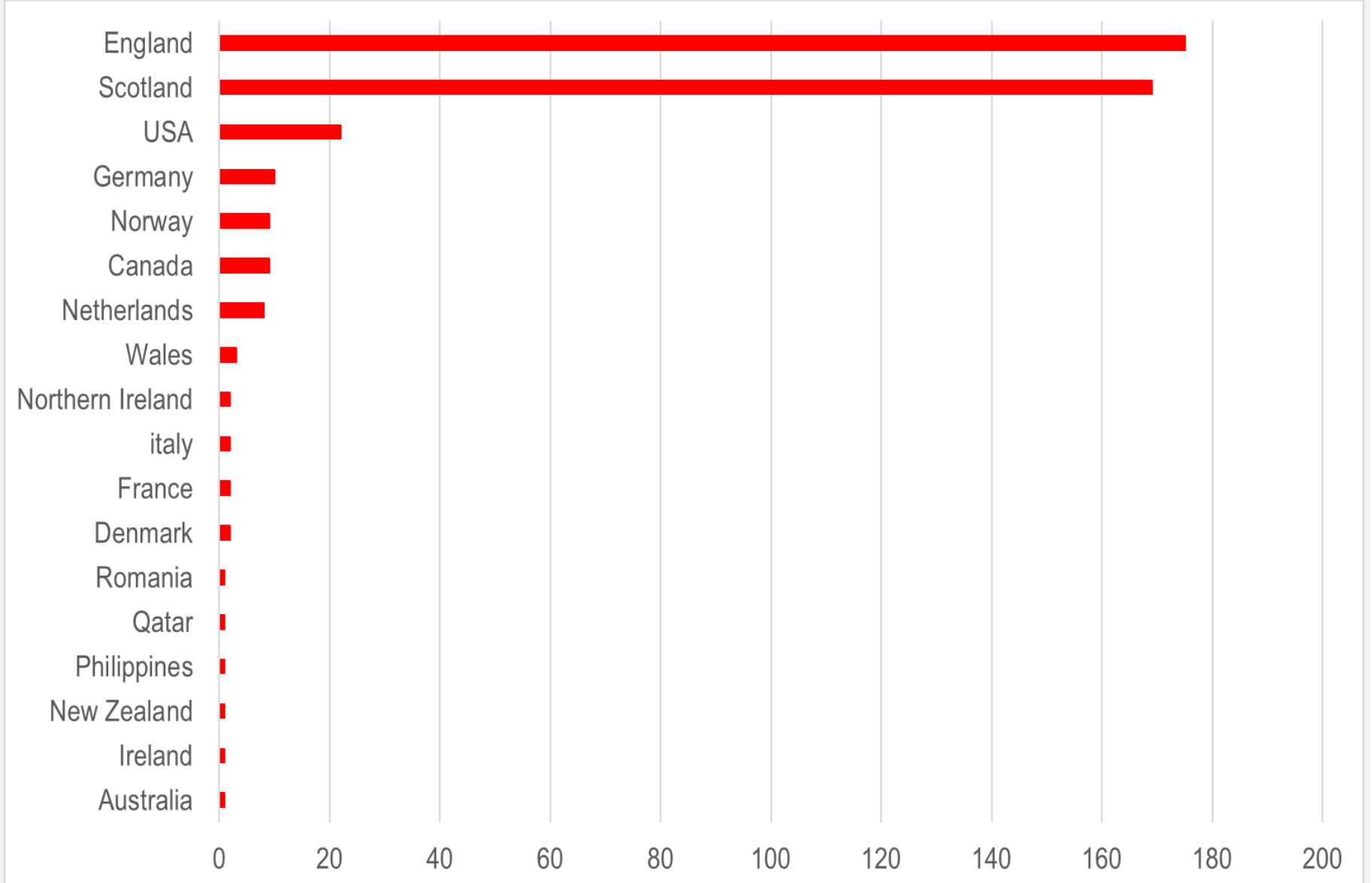
Survey Background

- Invitation distributed to 50% of 'subscribers', some 37,643 contacts
- Responses received from 1,075, although many were partial in nature
- Overall response rate of 2.9%
- Charts show number of respondents unless stated

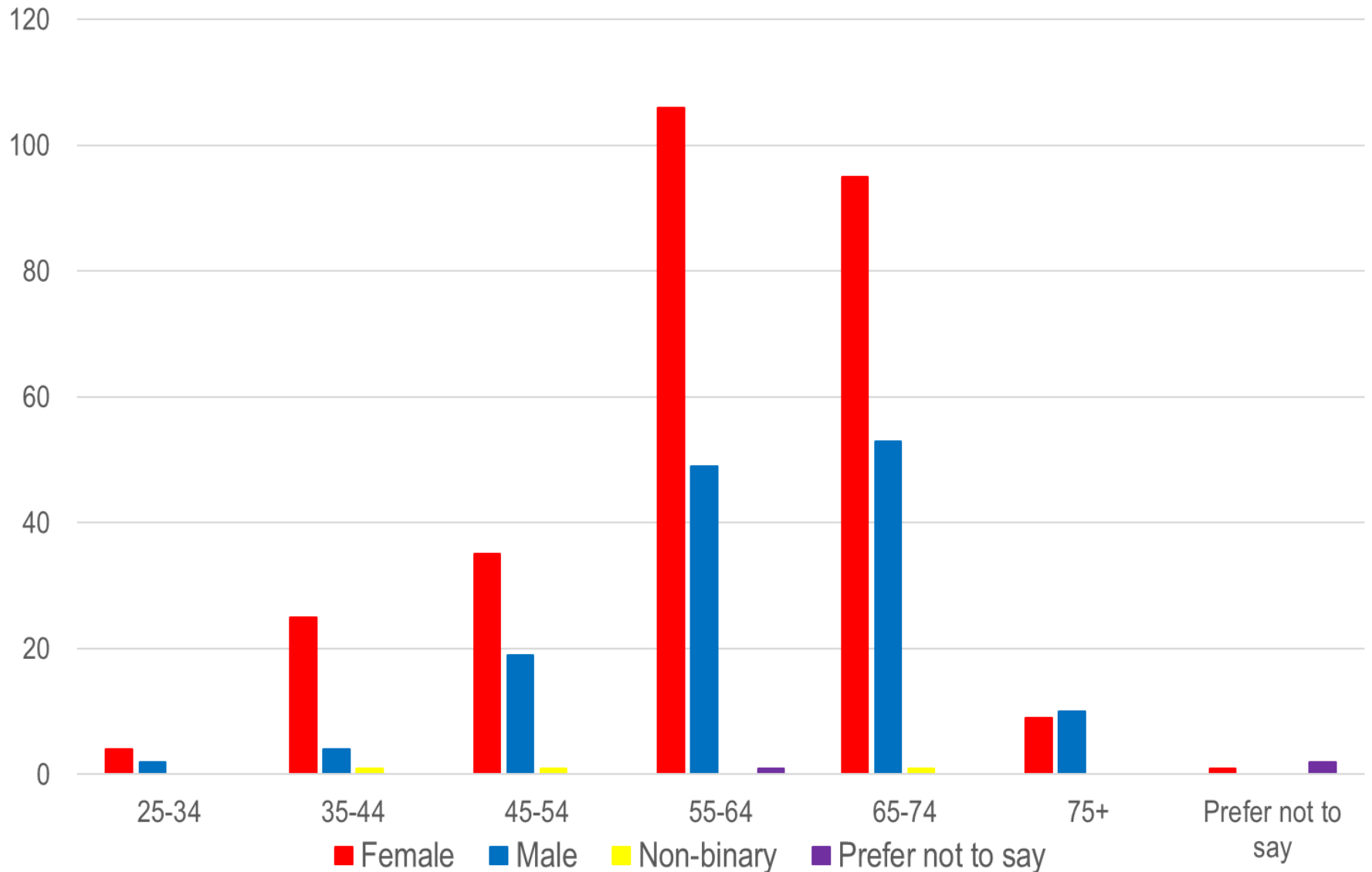
Limitations

- Those participating are:
 - Minded to interact with a tourist board
 - Predisposed to show some interest in Aberdeen / Aberdeenshire
 - Interested enough to complete a lengthy survey
- Therefore, we cannot assume respondents to be fully representative of the wider population in either their opinions or behaviours

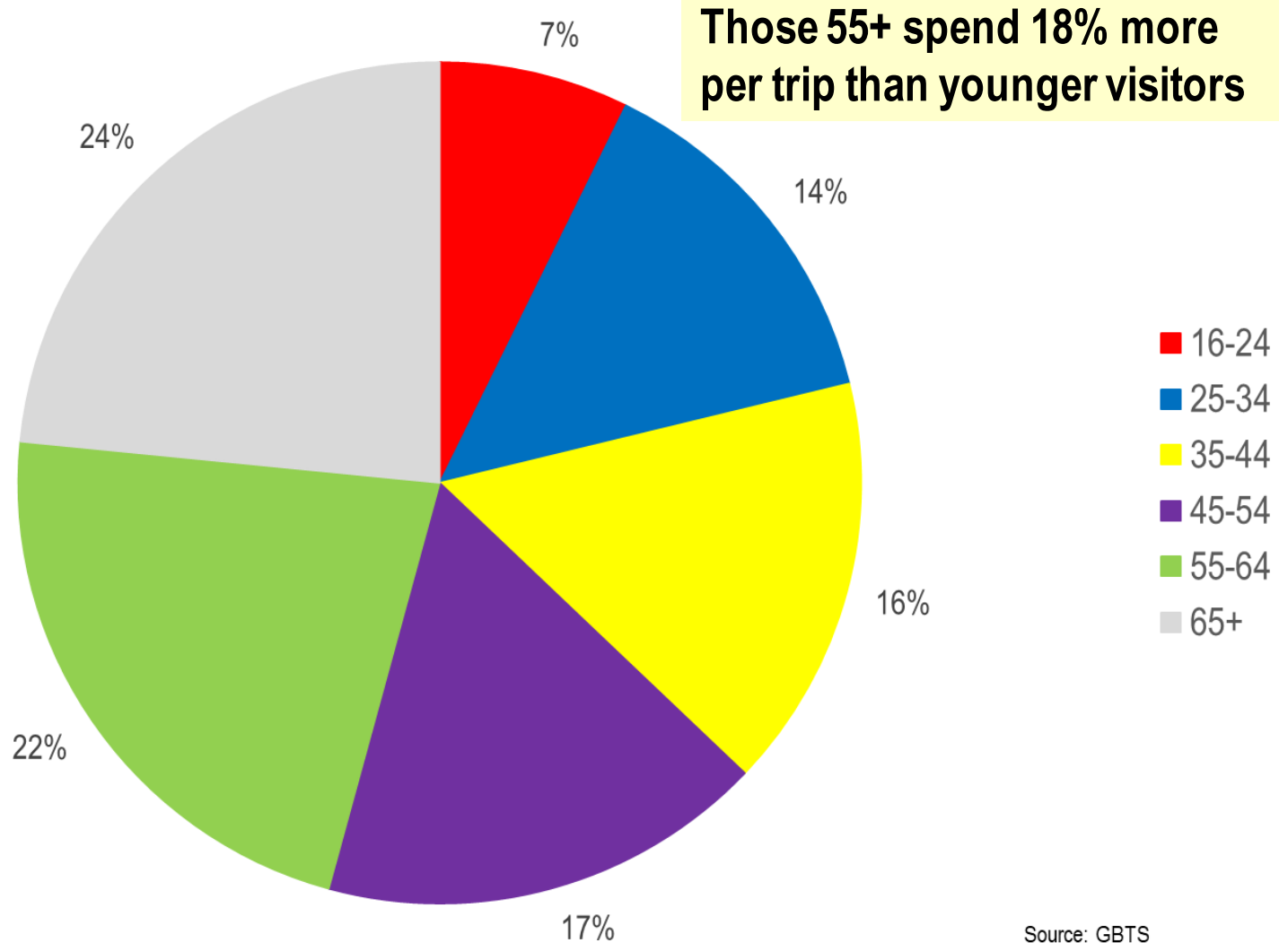
Respondent profile: country



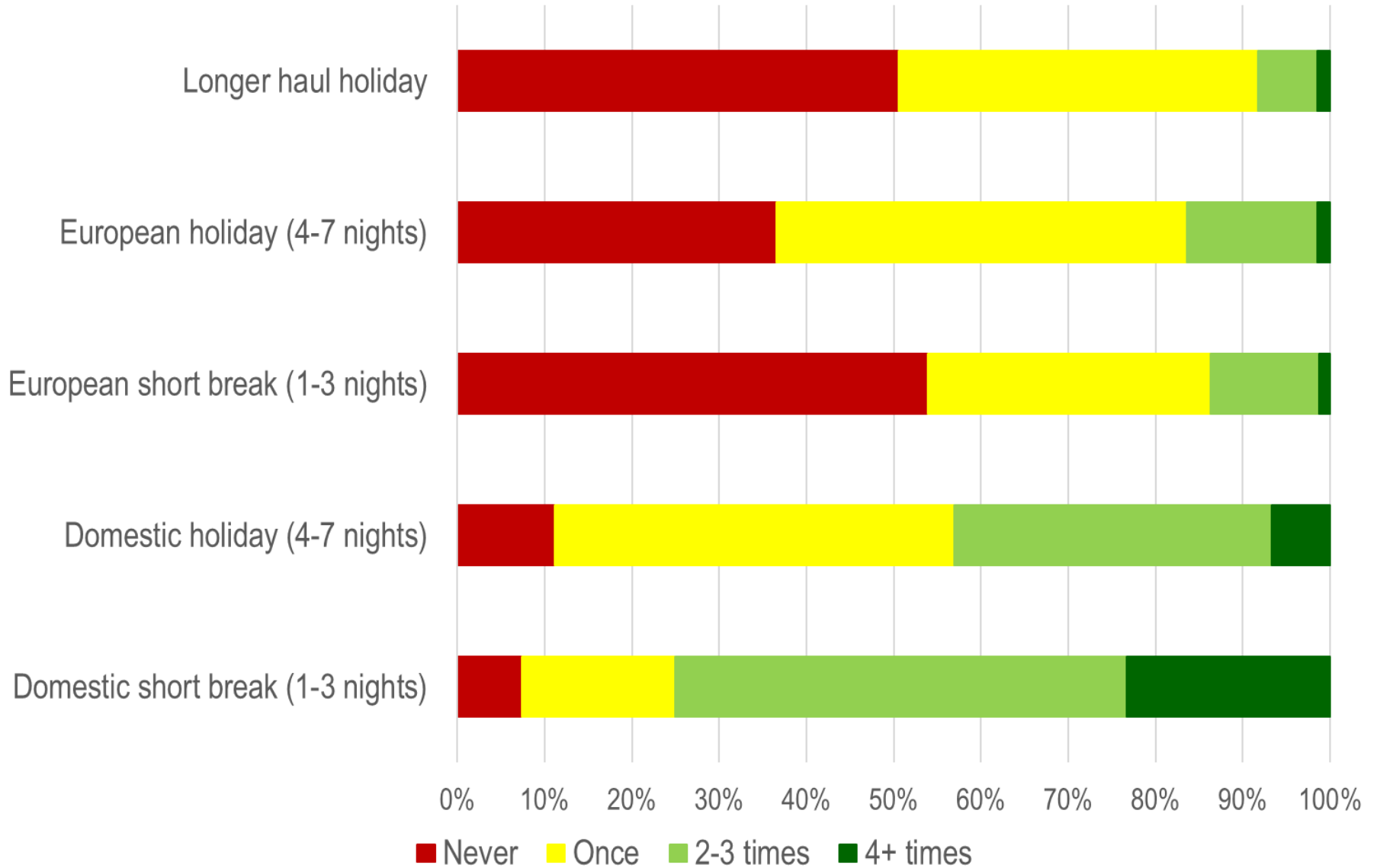
Respondent profile: demographics



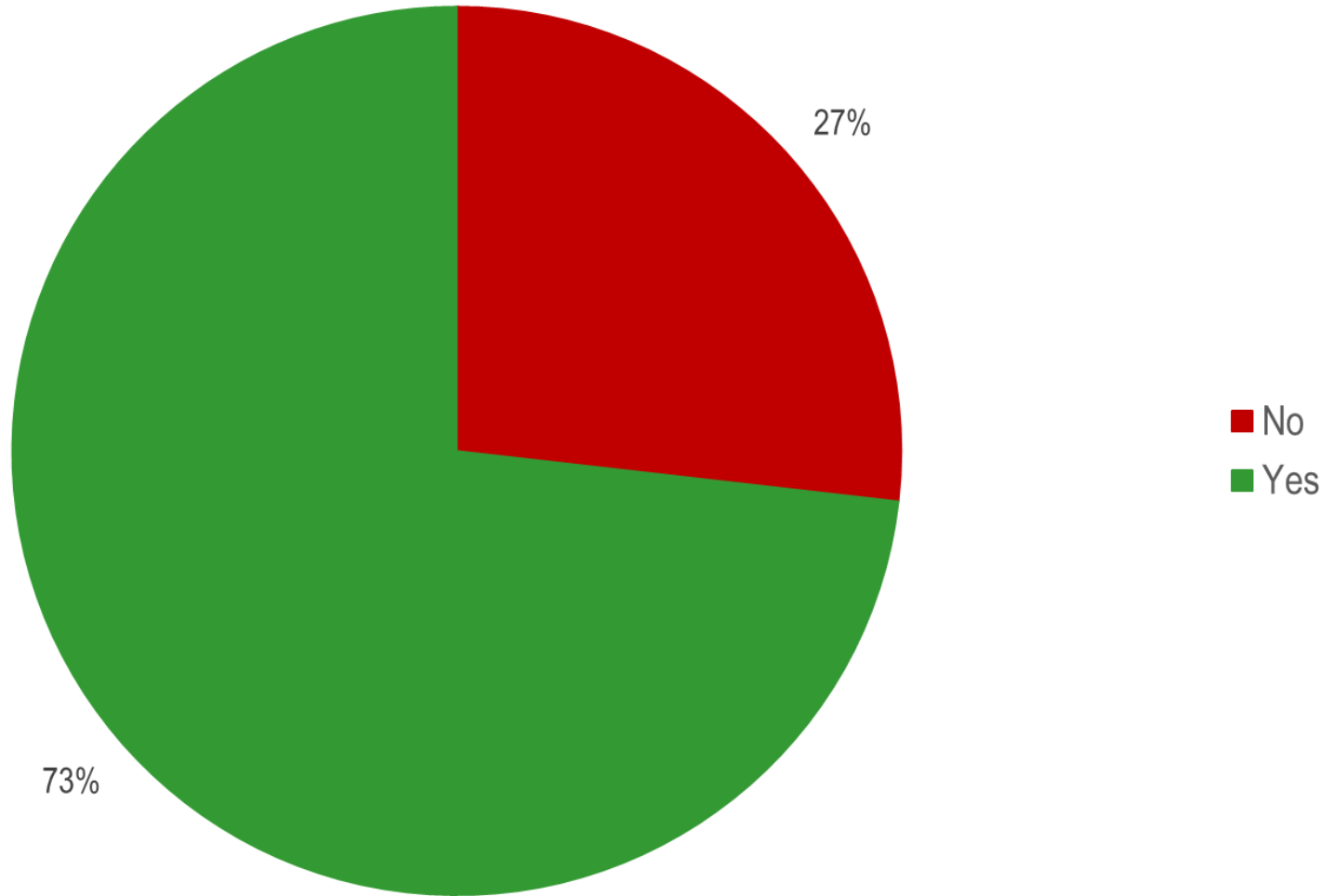
Domestic holiday spend in Scotland by age



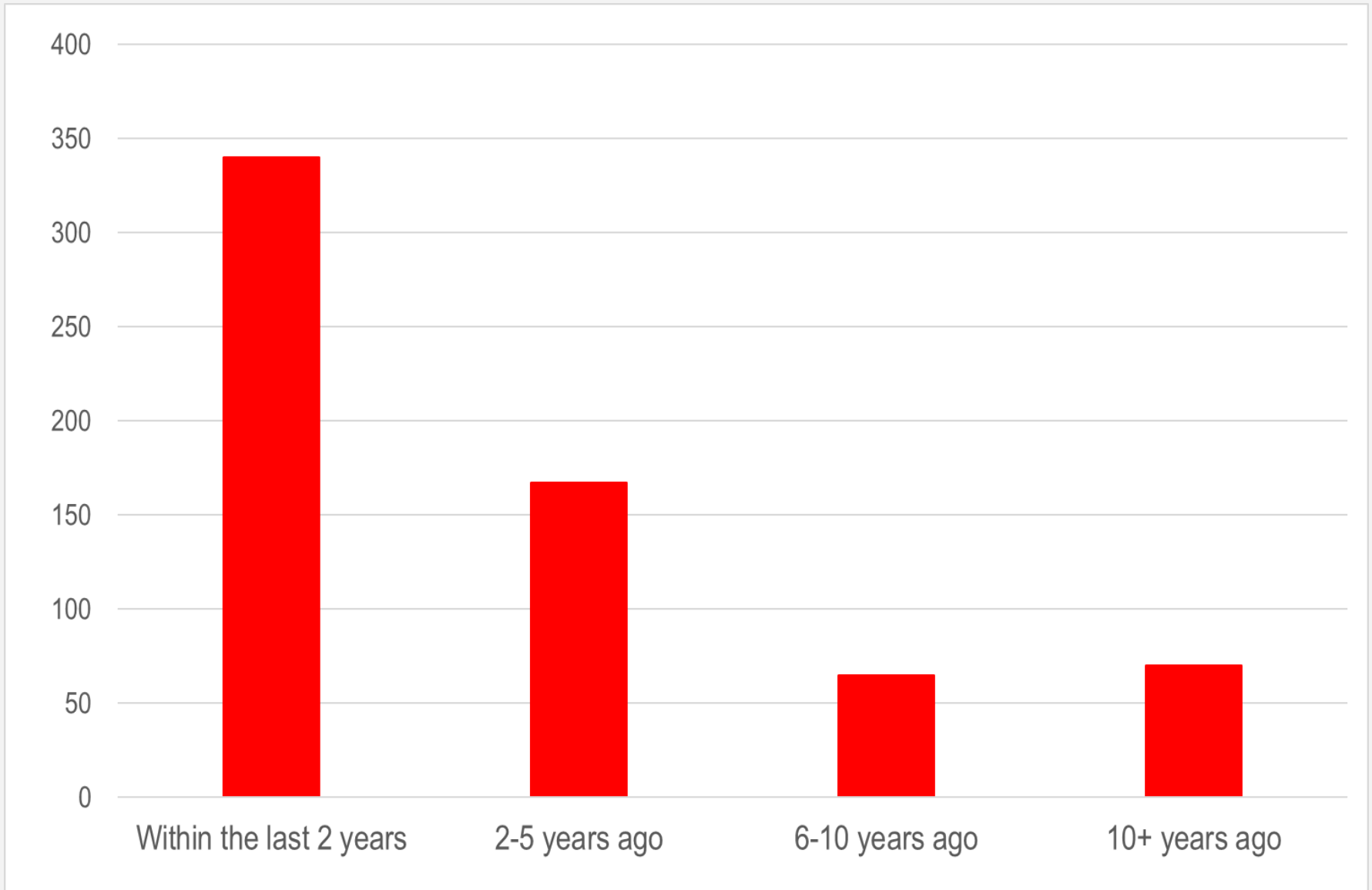
Normal holiday frequency



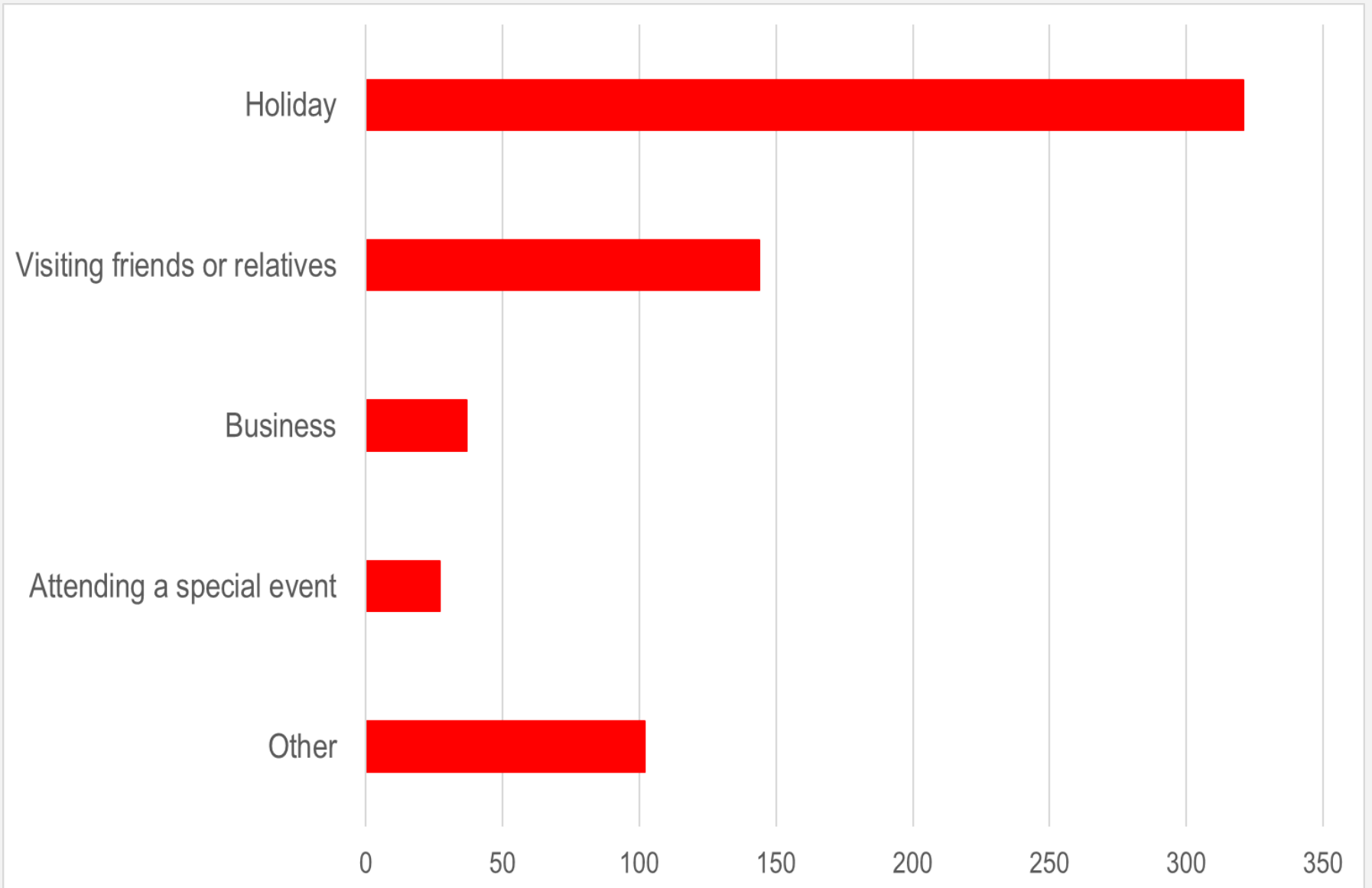
Respondent profile: whether visited region



Respondent profile: when was last visit?



Respondent profile: purpose of last visit



Types of holiday

Definitely not for me

Tried that, but not really my cup of tea

Never been on that type of holiday, but open-minded about trying it

Tried that, enjoyed it, would do it again

One of my favourite types of holiday

A holiday mainly to enjoy culture and heritage

A holiday to enjoy the landscape

A holiday to enjoy the local nightlife

A holiday to mainly enjoy local food and drink

A holiday to pursue self-development goals

A holiday to watch local wildlife

A rural retreat holiday

Adventure activity holiday

All-inclusive resort holidays

An escorted tour

Beach holiday

Camping

City-break

Cruising

Glamping

Sports holiday

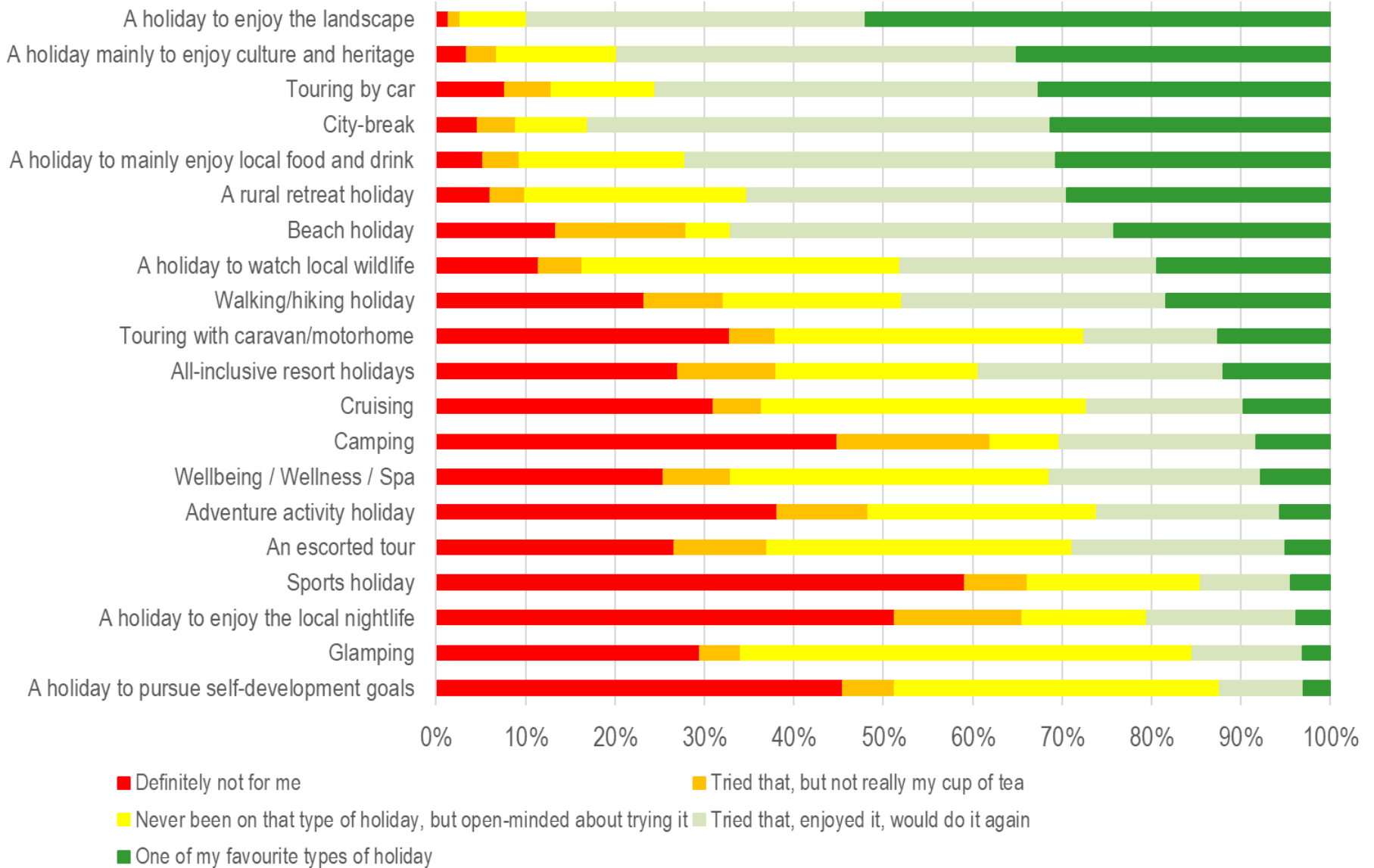
Touring by car

Touring with caravan/motorhome

Walking/hiking holiday

Wellbeing / Wellness / Spa

Types of holiday



Other types of holiday



Undertaking holiday activities

Not at all likely

2

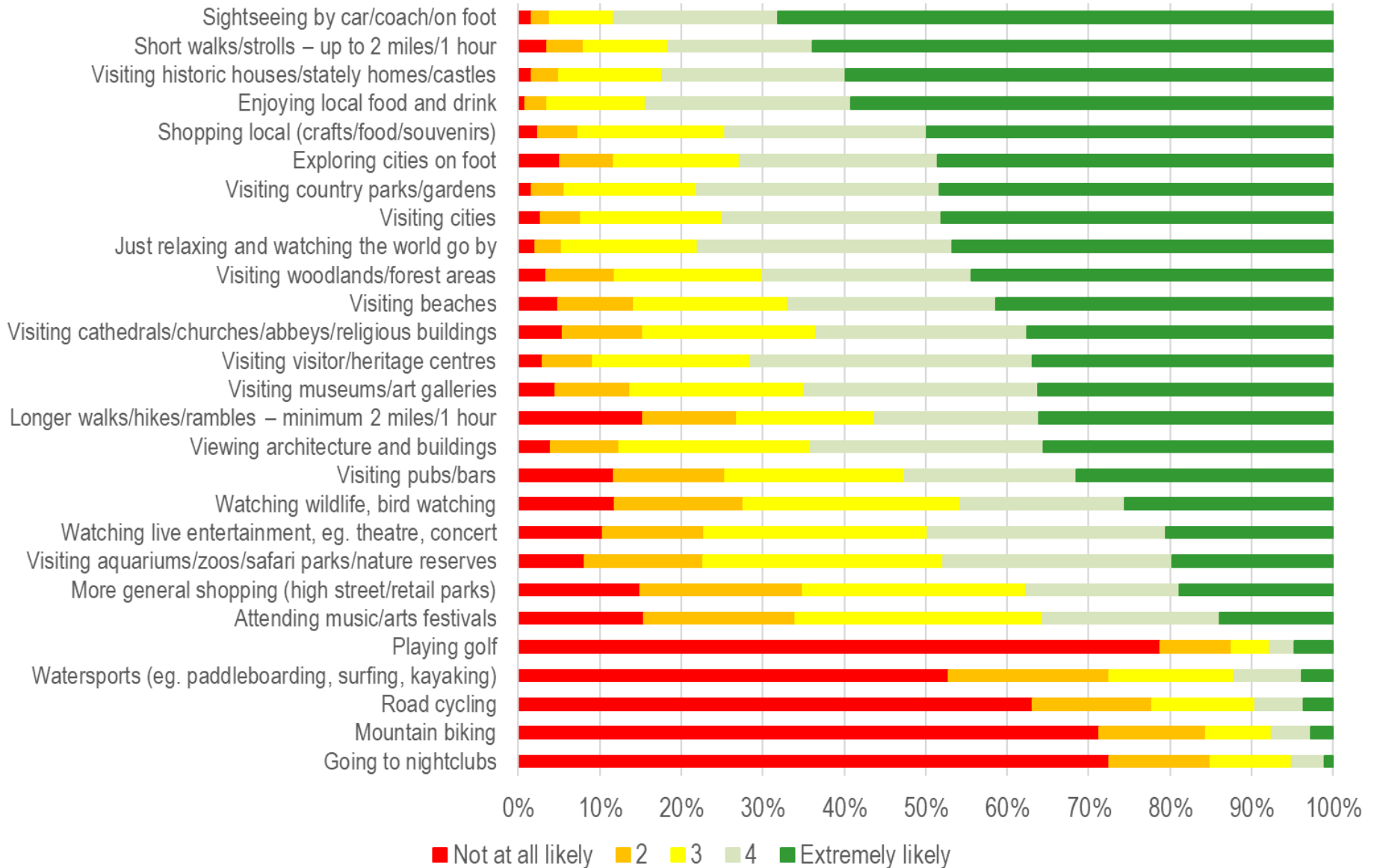
3

4

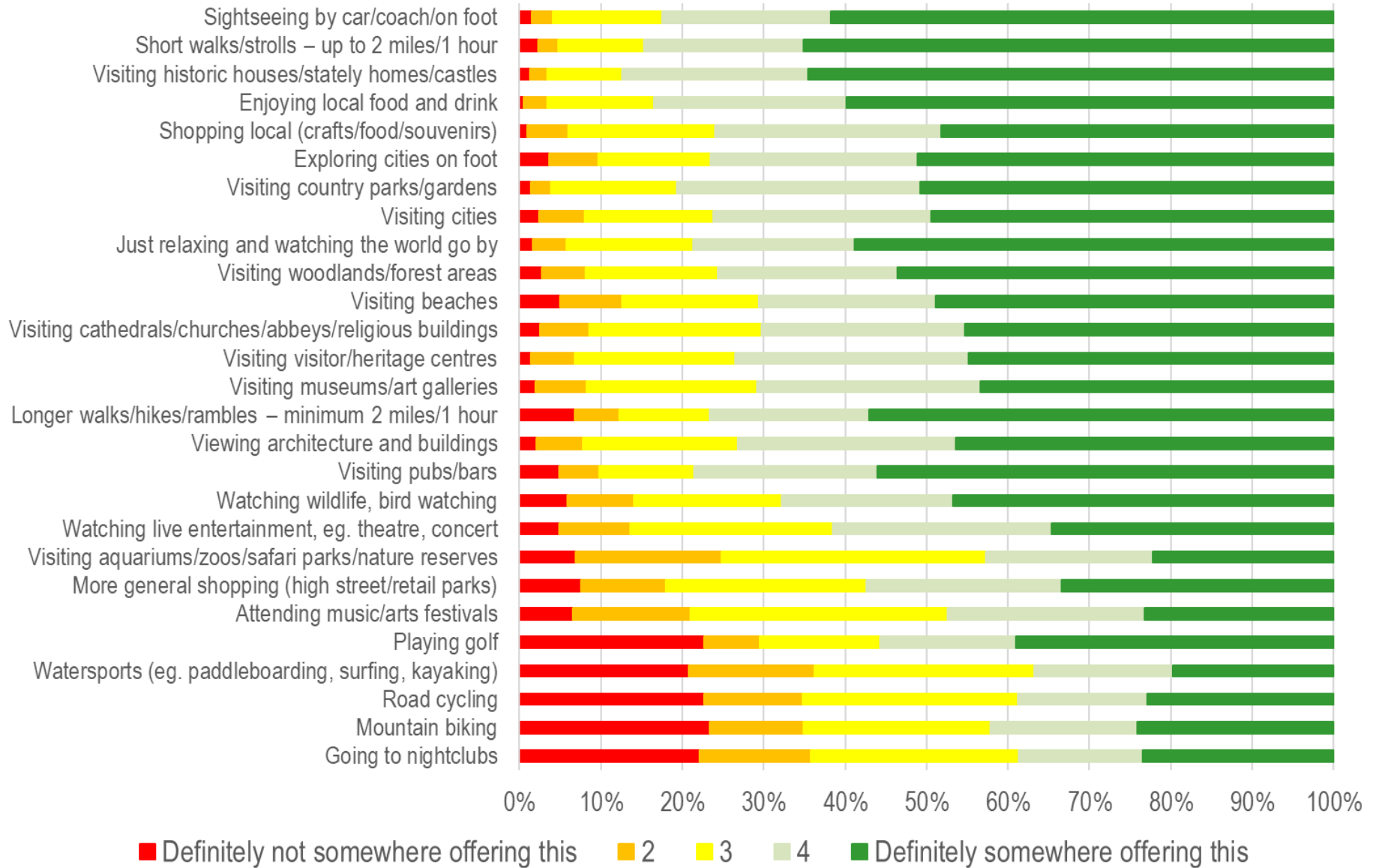
Extremely likely

- Attending music/arts festivals
- Enjoying local food and drink
- Exploring cities on foot
- Going to nightclubs
- Just relaxing and watching the world go by
- Longer walks/hikes/rambles – minimum 2 miles/1 hour
- More general shopping (high street/retail parks)
- Mountain biking
- Playing golf
- Road cycling
- Shopping local (crafts/food/souvenirs)
- Short walks/strolls – up to 2 miles/1 hour
- Sightseeing by car/coach/on foot
- Viewing architecture and buildings
- Visiting aquariums/zoos/safari parks/nature reserves
- Visiting beaches
- Visiting cathedrals/churches/abbeys/religious buildings
- Visiting cities
- Visiting country parks/gardens
- Visiting historic houses/stately homes/castles
- Visiting museums/art galleries
- Visiting pubs/bars
- Visiting visitor/heritage centres
- Visiting woodlands/forest areas
- Watching live entertainment, eg. theatre, concert
- Watching wildlife, bird watching
- Watersports (eg. paddleboarding, surfing, kayaking)

Holiday activities



Does region offer these activities?



Holiday activities not listed



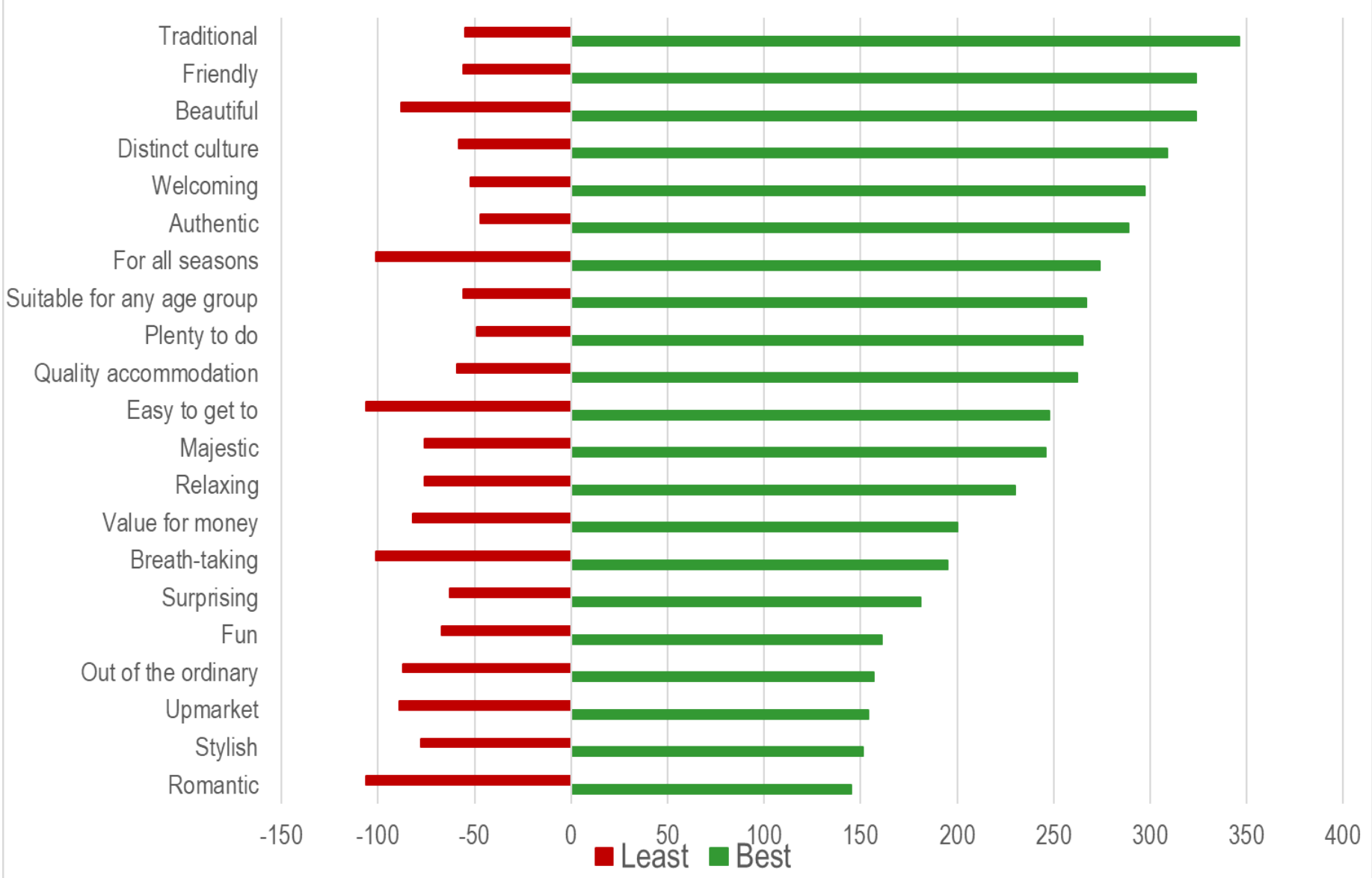
Words and phrases

- Respondents were asked to pick up to 3 words / phrases from a predefined list that they felt **best** and **least** described Aberdeen City and a set of other cities, and then Aberdeenshire and a set of other more rural destinations
- Not all respondents picked the maximum number of words / phrases, and respondents were more expressive about the City than the Shire, and more likely to pick positive than negative words / phrases

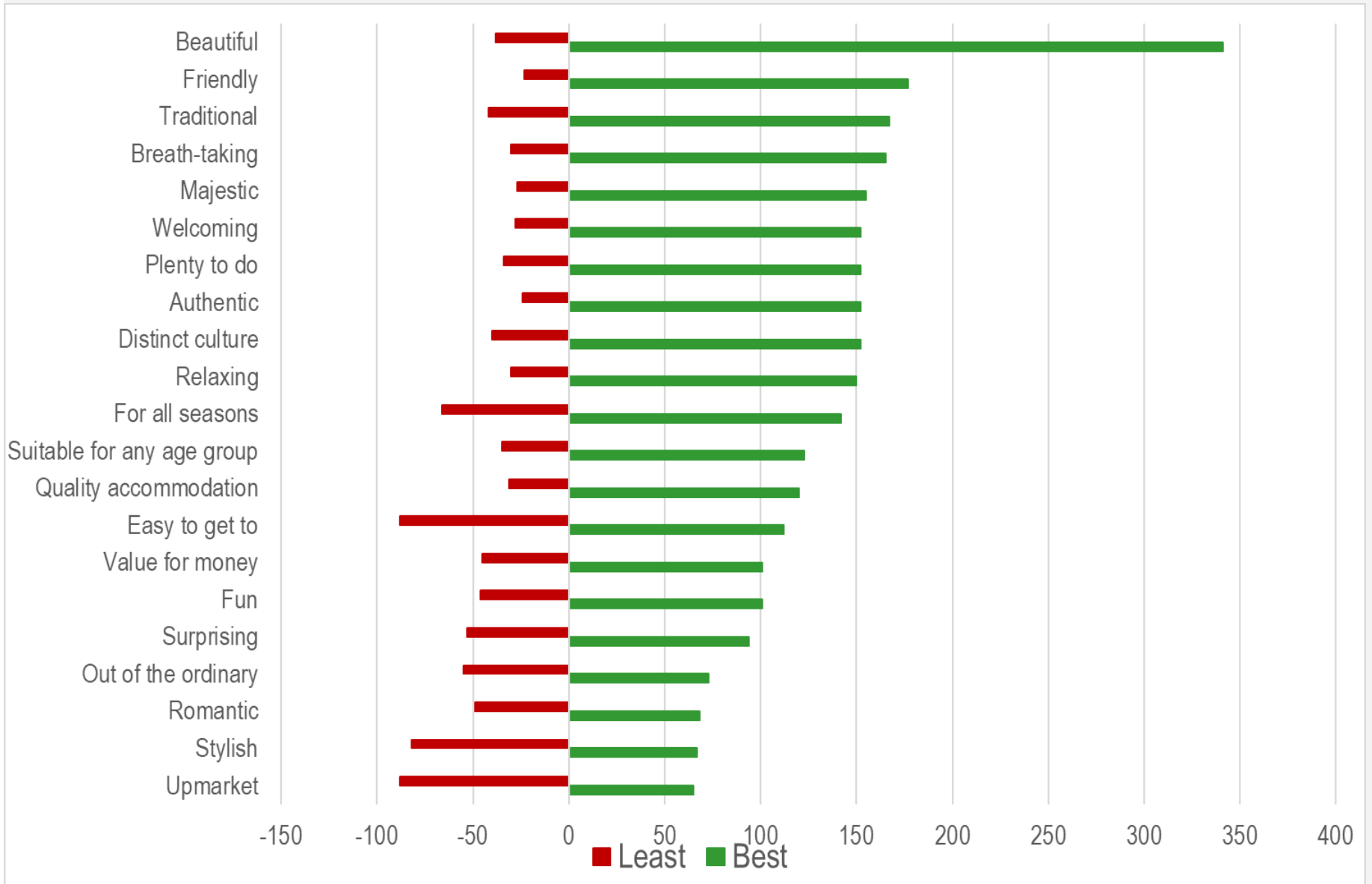
Words / phrases

Authentic
Beautiful
Breath-taking
Distinct culture
Easy to get to
For all seasons
Friendly
Fun
Majestic
Out of the ordinary
Plenty to do
Quality accommodation
Relaxing
Romantic
Stylish
Suitable for any age group
Surprising
Traditional
Upmarket
Value for money
Welcoming

Words / phrases for Aberdeen City



Words / phrases for Aberdeenshire VisitAberdeenshire



Competitive strengths/weaknesses



"Best describes"
Score

"Least describes"
Score

**Most picked word / phrase for
"Best describes"**

21

21

**Most picked word / phrase for
"Least describes"**

20
19
18
17
16
15
14
13
12
11
10
9
8
7
6
5
4
3
2

20
19
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12
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7
6
5
4
3
2

**Least picked word / phrase
for "Best describes"**

1

1

**Least picked word / phrase
for "Least describes"**

Competitive strengths/weaknesses



	"Best describes" Score	"Least describes" Score	
Most picked word / phrase for "Best describes"	21	21	Most picked word / phrase for "Least describes"
	20	20	
	19	19	
	18	18	
	17	17	
	16	16	
	15	15	
	14	14	
	13	13	
	12	12	
	11	11	
	10	10	
	9	9	
	8	8	
	7	7	
	6	6	
	5	5	
	4	4	
	3	3	
	2	2	
Least picked word / phrase for "Best describes"	1	1	Least picked word / phrase for "Least describes"

Net Score = "Best describes"
Score - "Least describes"
Score

Net Score range +20 to -20

+20 would indicate most picked word / phrase for "best describes" and least picked word / phrase for "least describes"

-20 would indicate least picked word / phrase for "best describes" and most picked word / phrase for "least describes"

If a destination scores higher than all its competitors this indicates a relative strength in relation to that word / phrase ★

If a destination scores lower than all its competitors this indicates a relative weakness in relation to that word / phrase ★

Words / phrases: city destinations



	Aberdeen	Newcastle	Cardiff	Manchester	Belfast	Dundee
Traditional ★	17	4	2	-7	12	14
Authentic	15	3	14	-3	18	15
Friendly	14	13	5	5	6	18
Welcoming	14	15	4	2	10	12
Distinct culture	11	5	13	0	14	10
Plenty to do	11	15	9	19	14	0
Suitable for any age group	8	6	15	13	12	13
Beautiful ★	4	-11	-6	-15	-11	-10
Quality accommodation	4	8	15	13	6	2
Majestic ★	-2	-12	-11	-14	-11	-15
Relaxing	-3	-15	-6	-17	-13	-1
Surprising ★	-3	-2	1	-2	3	2
For all seasons ★	-4	1	9	15	5	1
Fun ★	-5	16	9	13	8	0
Value for money ★	-6	4	0	-6	-3	5
Easy to get to	-10	11	-10	15	-17	2
Out of the ordinary	-11	-10	-14	-6	-4	-8
Stylish	-11	-5	-7	7	-7	-15
Breath-taking ★	-12	-20	-18	-20	-15	-17
Upmarket	-14	-14	-15	-2	-14	-17
Romantic ★	-20	-14	-14	-13	-13	-13

Words / phrases: rural destinations VisitAberdeenshire

	Aberdeenshire	Northumberland	North Wales	Lake District	Scottish Highlands
Friendly ★	19	15	2	0	12
Majestic	14	-7	2	13	16
Authentic ★	14	10	13	0	13
Breath-taking	12	6	16	17	14
Welcoming	12	14	-5	2	8
Beautiful	11	8	9	17	11
Plenty to do	8	9	9	15	1
Traditional	7	11	8	-2	8
Relaxing	6	11	9	8	5
Distinct culture	5	-1	10	-12	6
Quality accommodation	2	0	-1	13	4
Suitable for any age group	1	2	10	3	-9
Value for money	-6	7	7	-20	-12
Fun	-7	-8	-9	-2	-11
For all seasons	-7	-4	-6	0	-12
Surprising	-11	-8	-6	-14	-7
Romantic	-12	-10	-14	8	4
Out of the ordinary	-13	-15	-12	-12	-2
Easy to get to	-13	-5	-11	-5	-18
Stylish	-17	-19	-18	-14	-18
Upmarket ★	-20	-19	-18	-13	-18

Information sources used to decide where to go

Influencers/Travel Bloggers

Newspapers/magazines

Online travel agents, eg. booking.com, Trivago

Other visitors' experiences within destinations

Other, please state:

Past personal experience

Personal advice from travel professional/agent

Printed brochures

Printed travel guide books

Social media

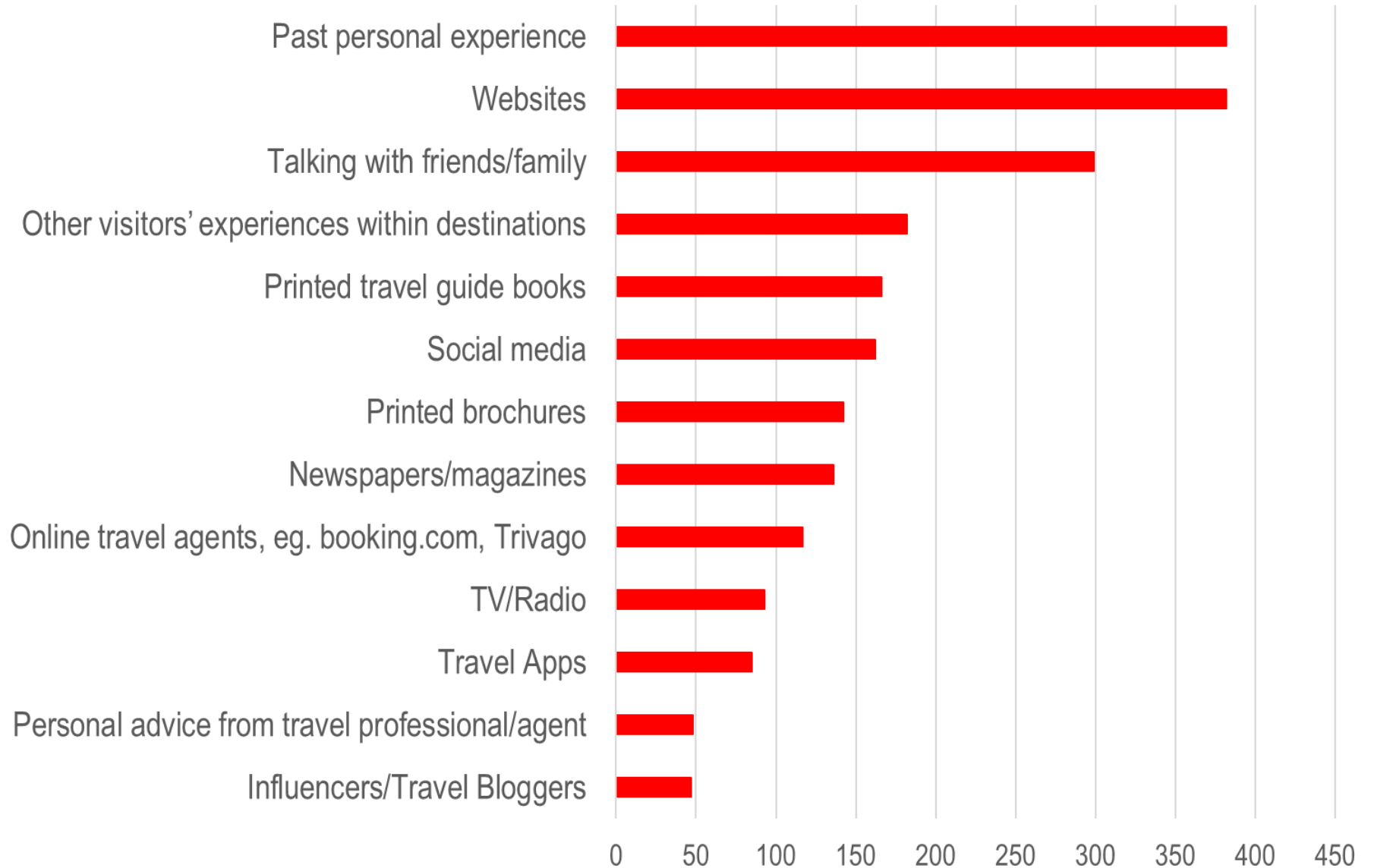
Talking with friends/family

Travel Apps

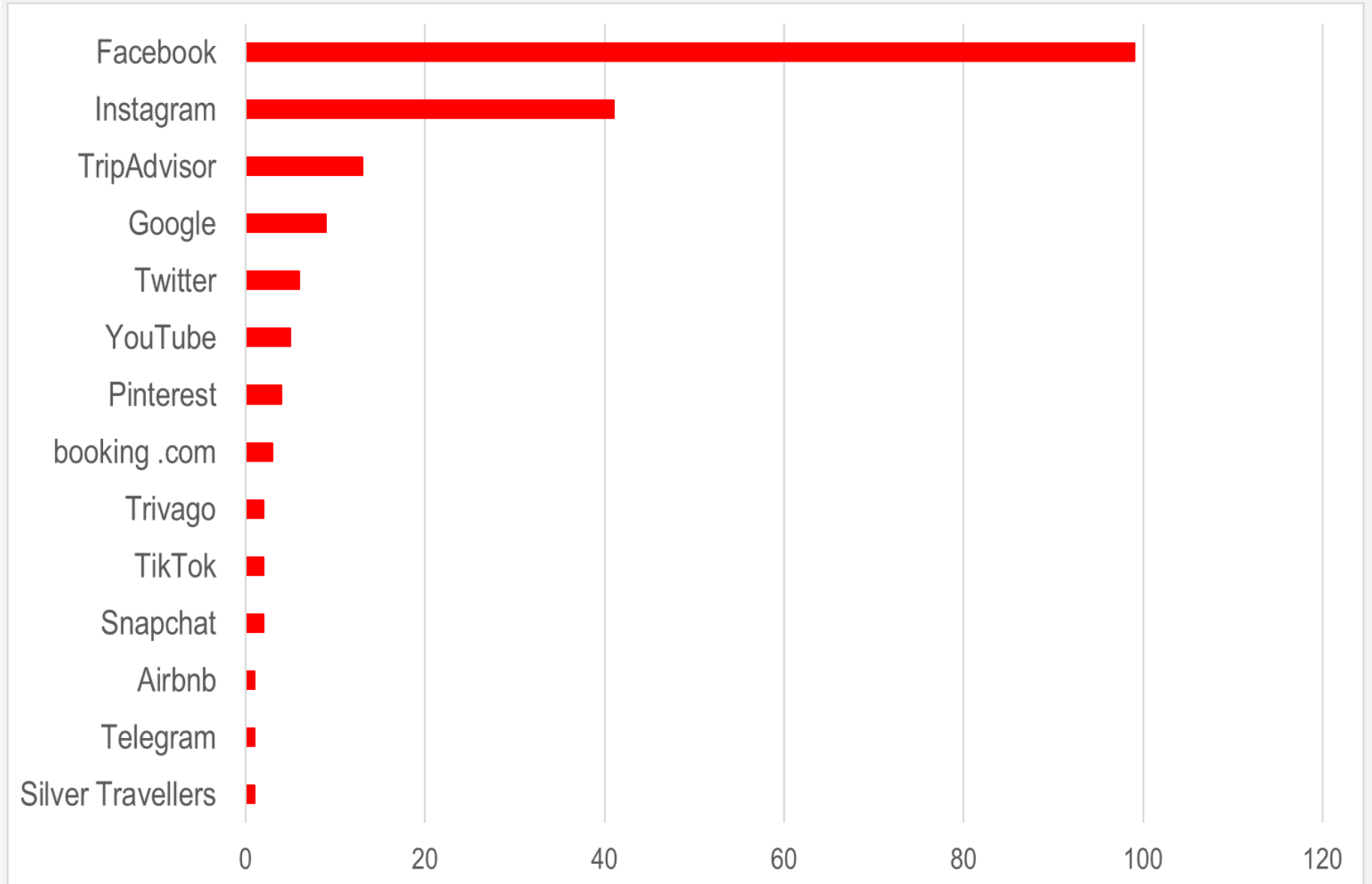
TV/Radio

Websites

Information sources used to decide where to go



Social media channels used to help plan **(open-ended)**



Types of website used when planning a holiday

Booking platforms, eg. booking.com

Individual tourism provider's website, eg. accommodation providers

Magazine/newspaper websites

Search engine, eg. Google, Bing.

The local official tourism website

The national official tourism website

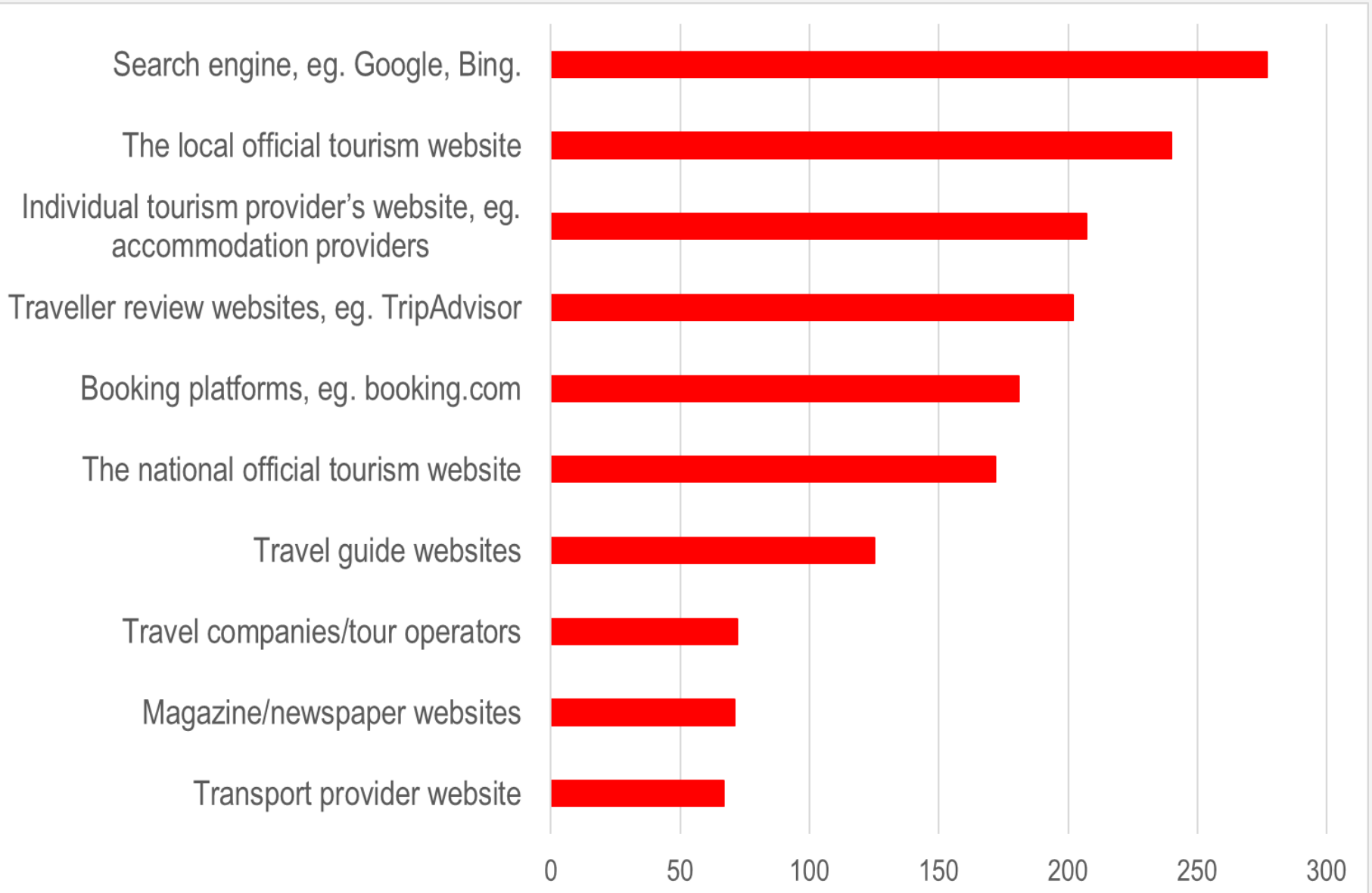
Transport provider website

Travel companies/tour operators

Travel guide websites

Traveller review websites, eg. TripAdvisor

Types of website used when planning a holiday



Deciding what to do in the destination

Chatting to locals

Chatting to other tourists

Chatting to those who work in tourism/hospitality locally

Hotel concierge/reception

Local events/what's on guides

Local newspapers

Local official tourism website

Local radio

Local tourist information centres

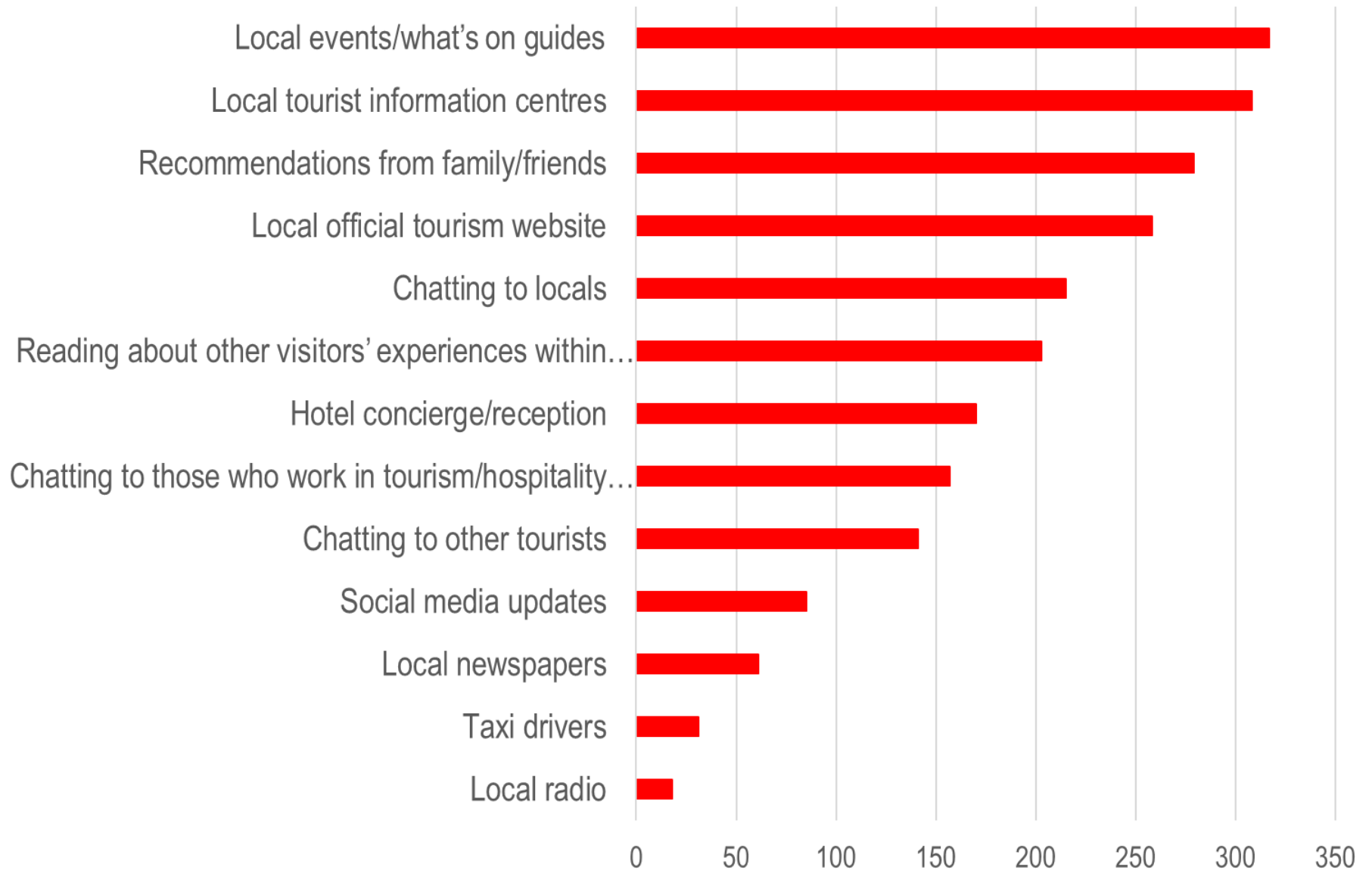
Reading about other visitors' experiences within destinations

Recommendations from family/friends

Social media updates

Taxi drivers

Deciding what to do in the destination



Agree / disagree statements

I always seek out new experiences

I am happy to go back to places I have visited in the past

I am more of a city person

I am more than happy to change my planned activities and experiences during my holiday/short break

I enjoy meeting other visitors and locals

I enjoy spending time in the outdoors and in nature landscapes

I like to get off the beaten track

I like to stick to my planned activities and experiences once on holiday/short break

I love to taste and experience local food and drink

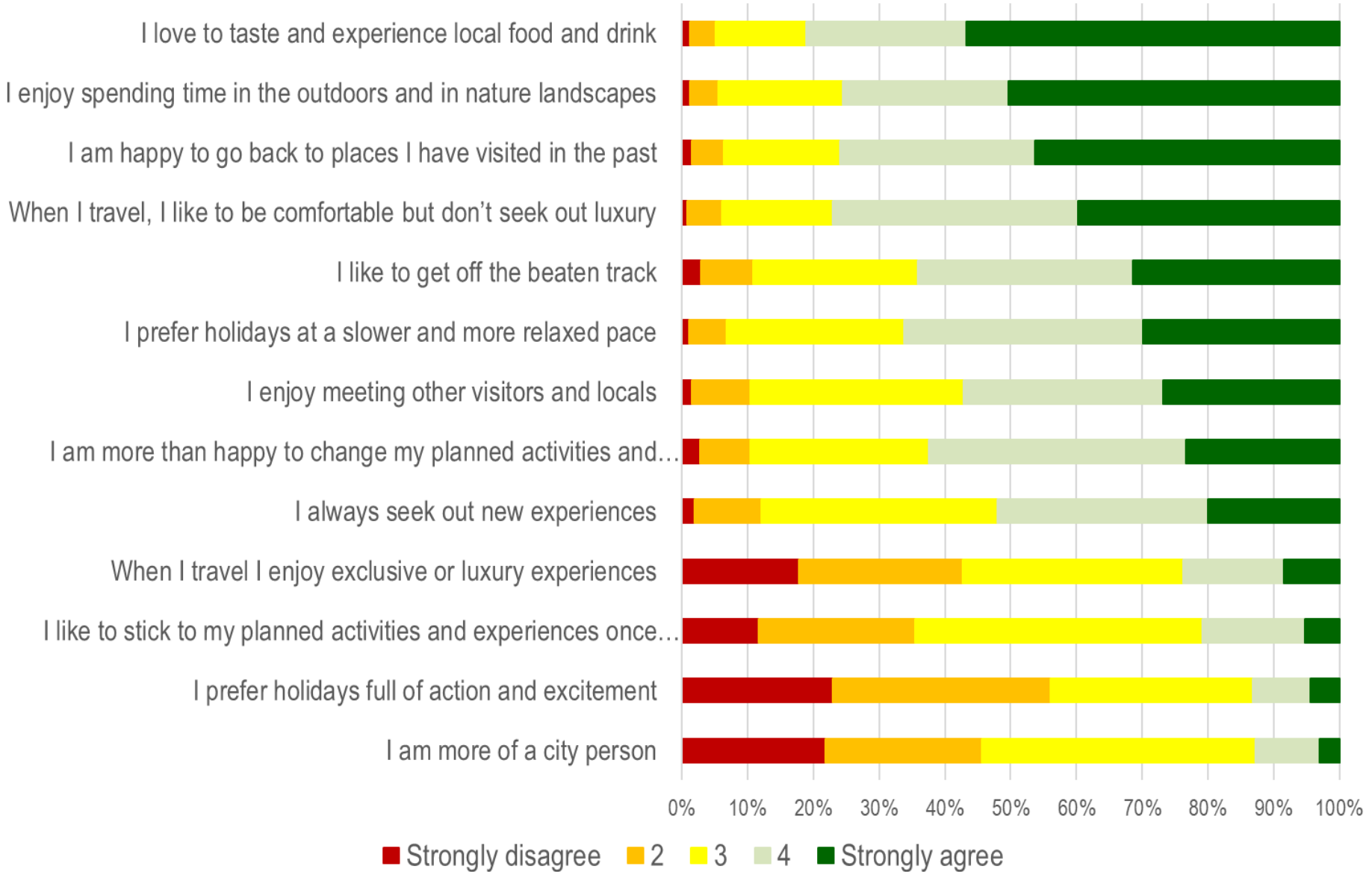
I prefer holidays at a slower and more relaxed pace

I prefer holidays full of action and excitement

When I travel I enjoy exclusive or luxury experiences

When I travel, I like to be comfortable but don't seek out luxury

Agree / disagree statements



Likelihood of using types of accommodation

Bed & Breakfast/Guest House

Campervan/Motorhome

Camping

Family/Friends

Glamping

Hostel

Hotel

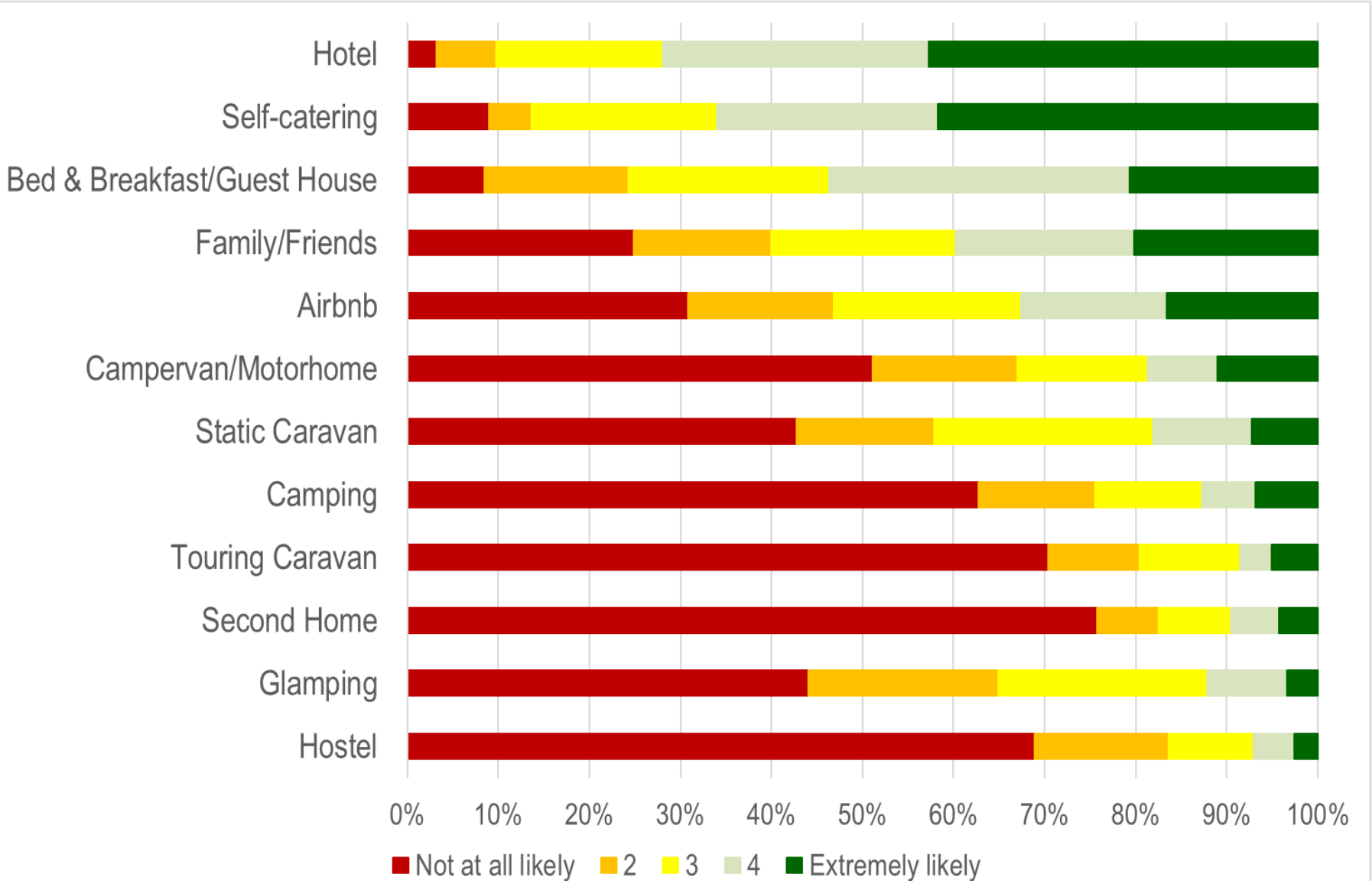
Second Home

Self-catering

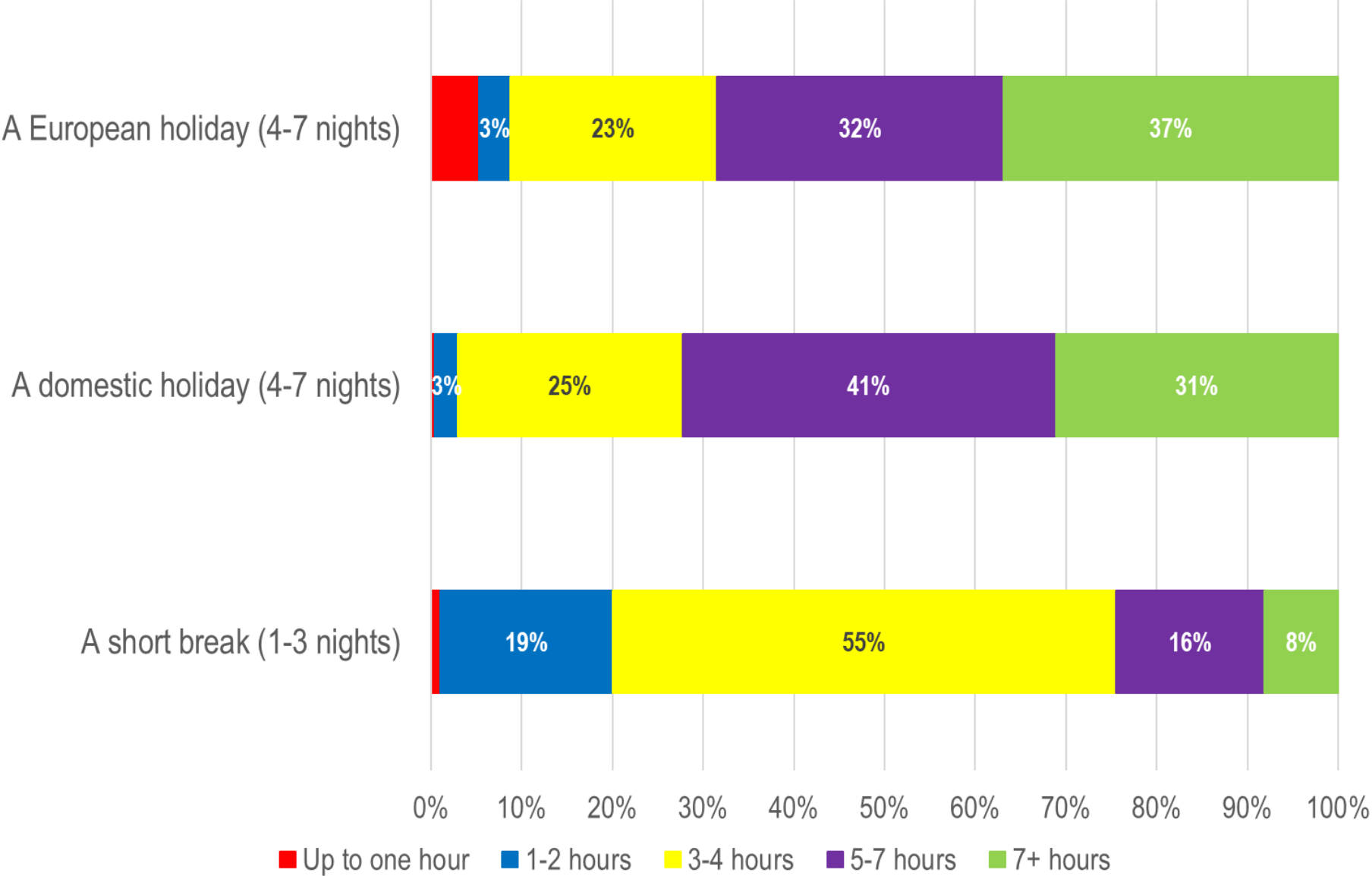
Static Caravan

Touring Caravan

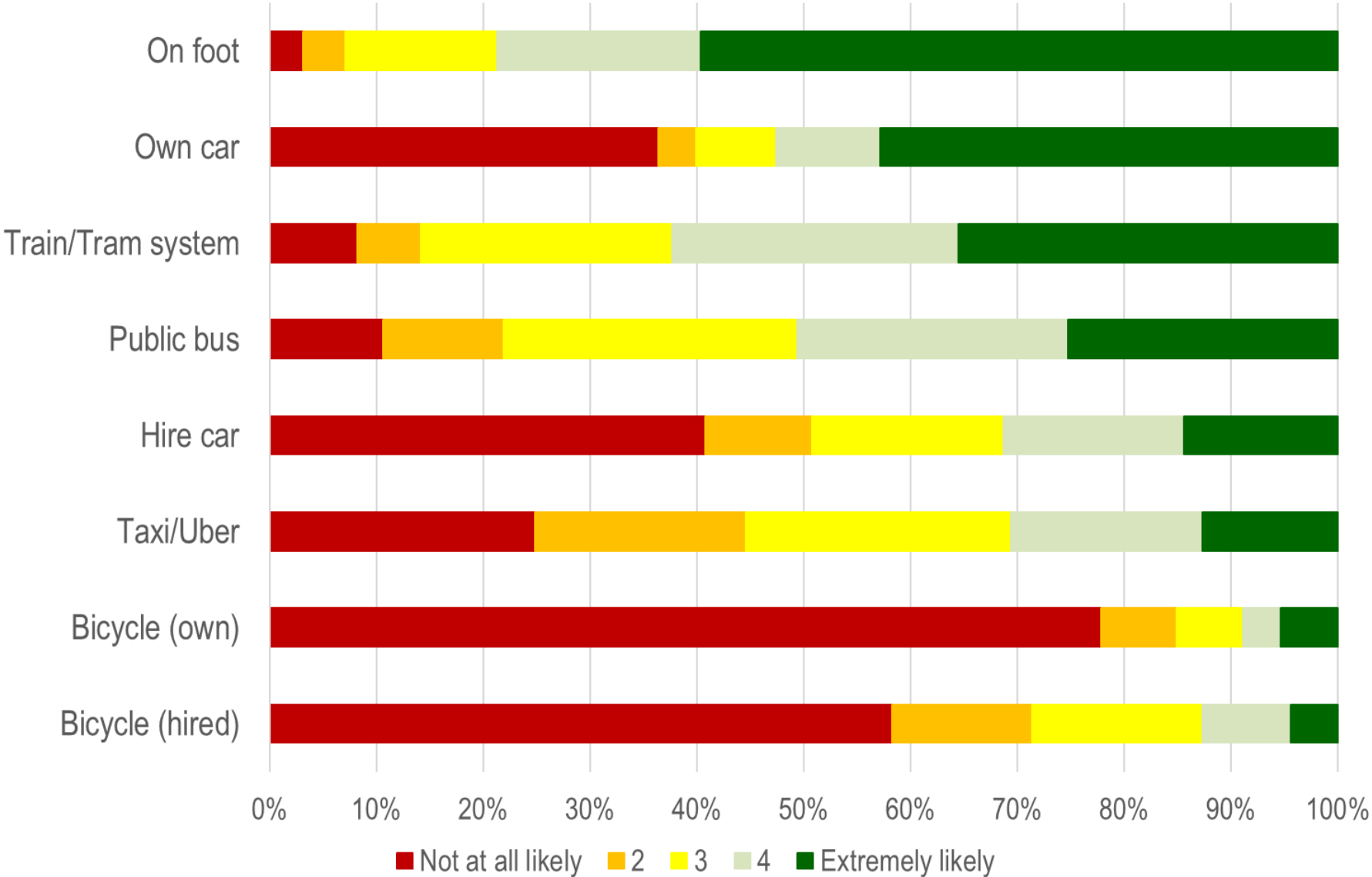
Likelihood of using types of accommodation



Journey time tolerances



Transport once at destination



Cost of travel

Ease of cancelling if plans change

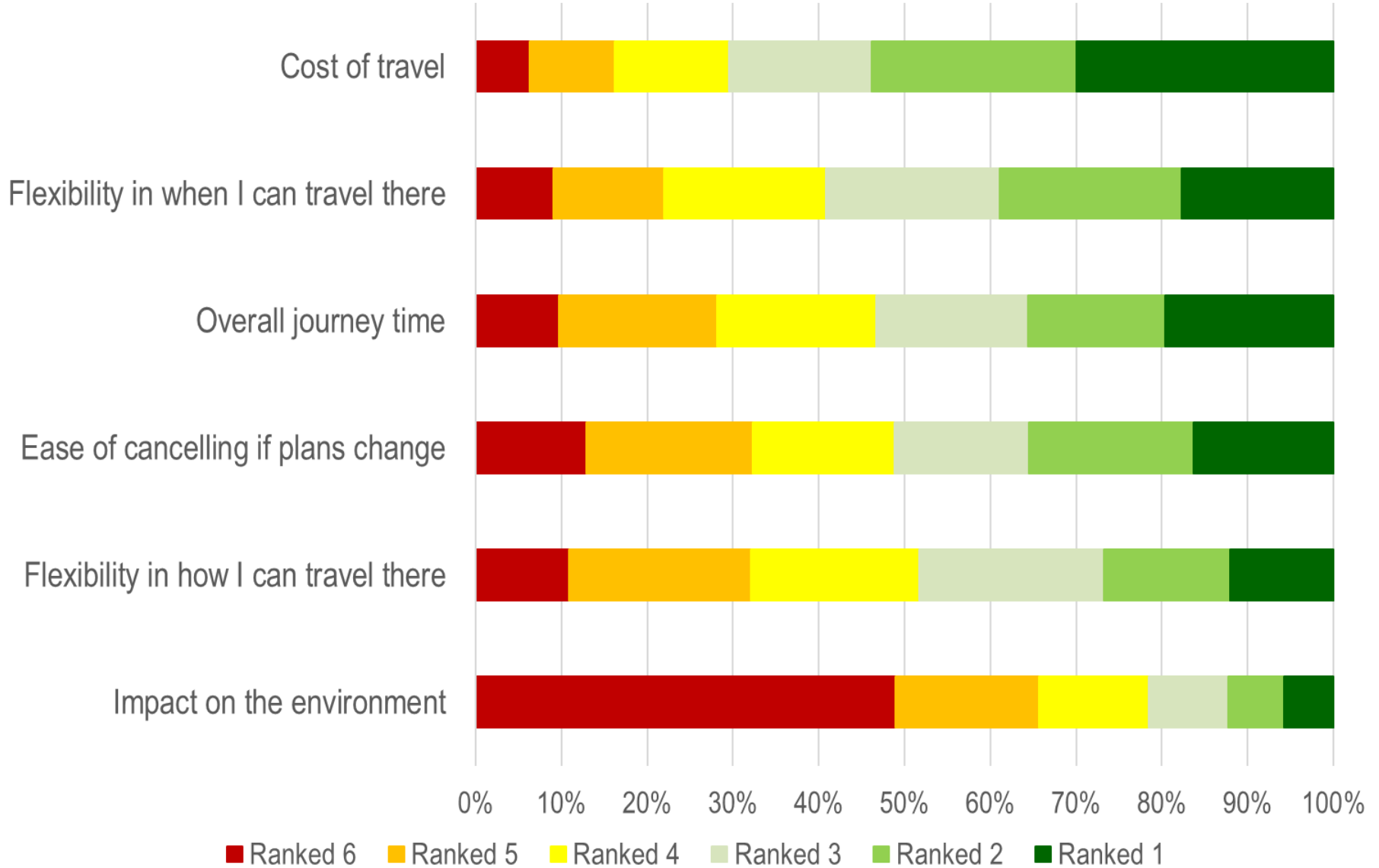
Flexibility in how I can travel there

Flexibility in when I can travel there

Impact on the environment

Overall journey time

Importance when arranging travel



About the analysis



- These slides have been created on behalf of VisitAberdeenshire by Scattered Clouds who undertook the survey analysis in February and March 2022