

2024 Annual Consumer Research Main findings November 2024

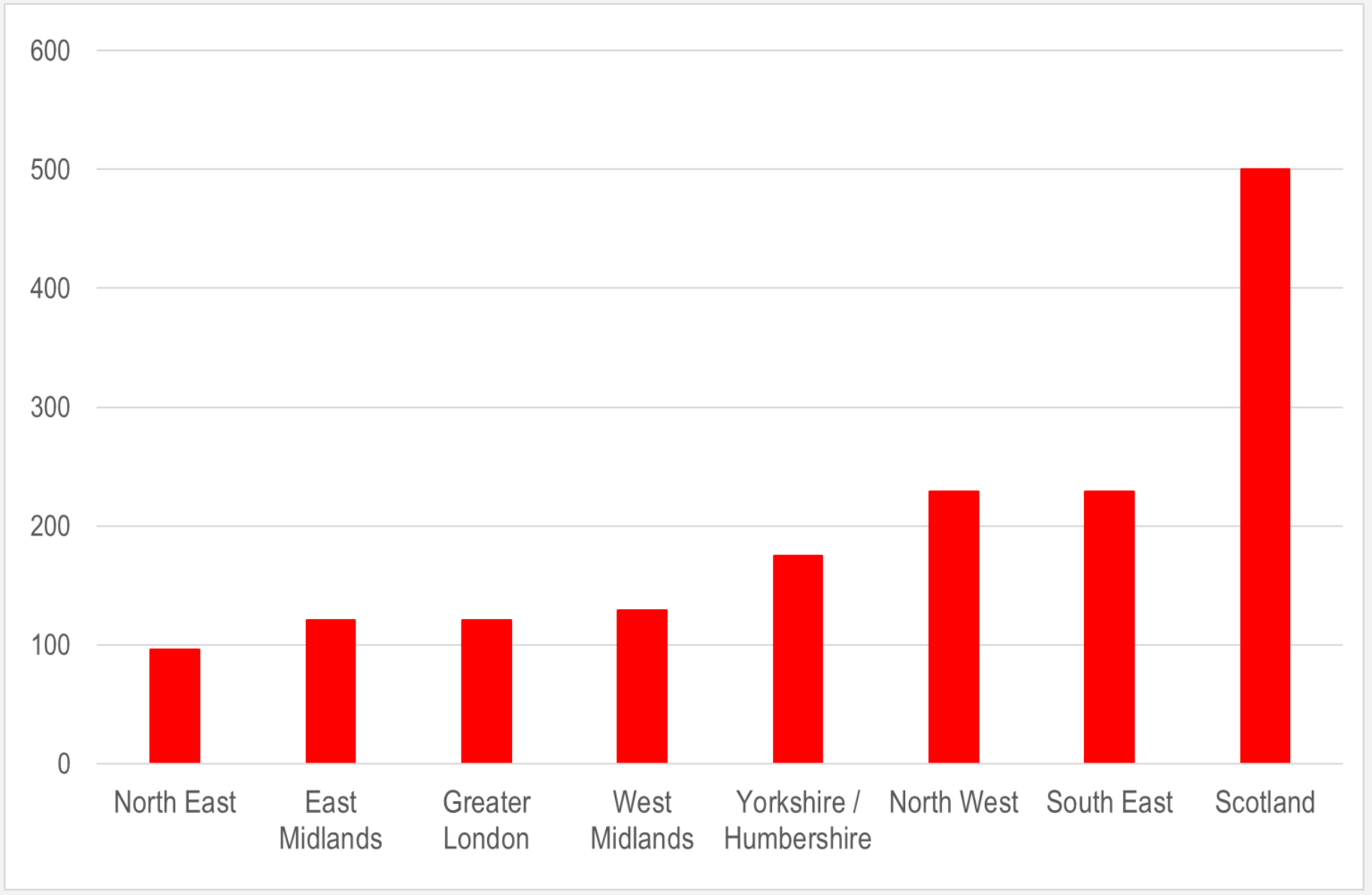


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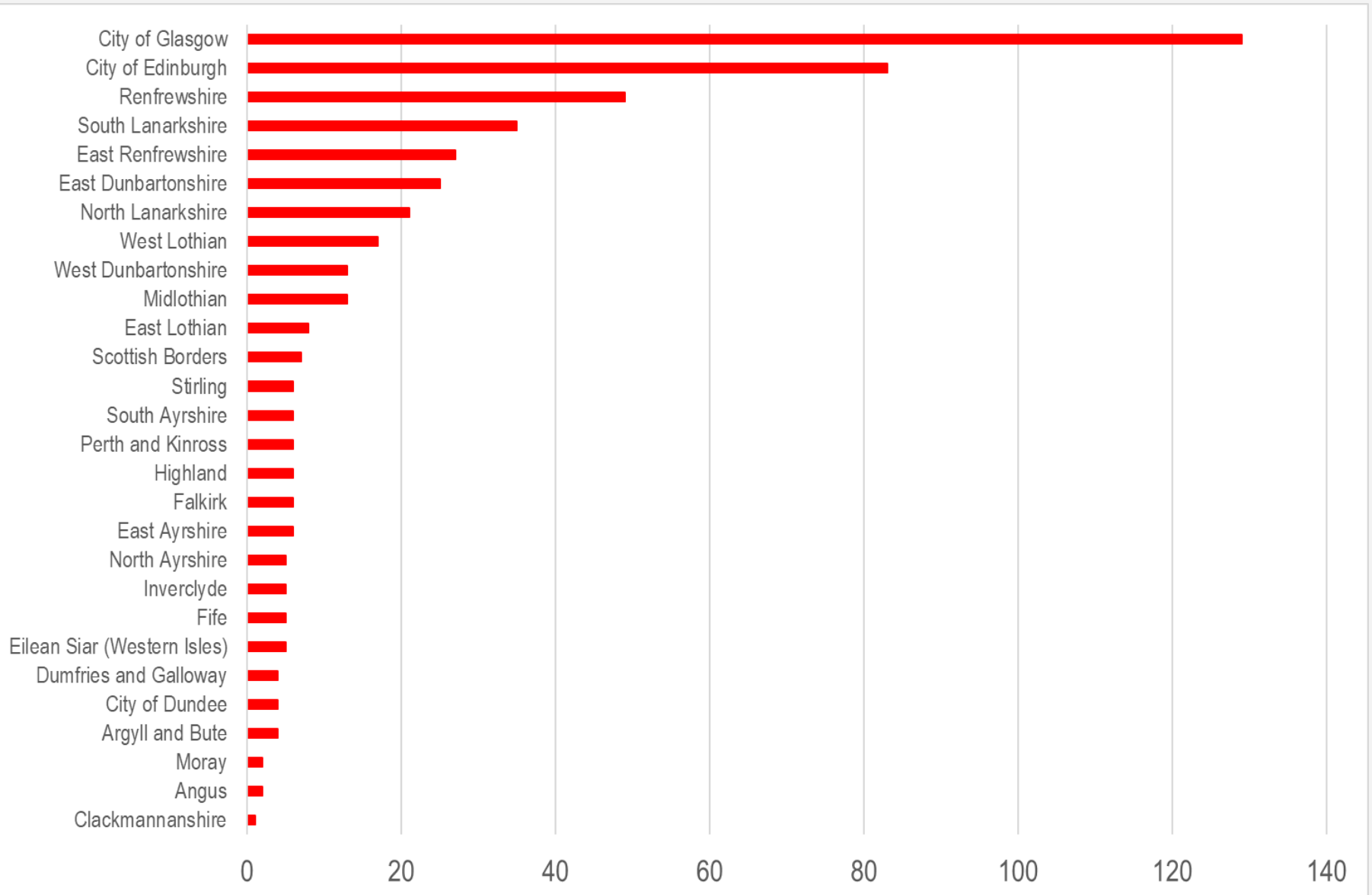
About the study

- This is the third wave of an annual survey that allows VisitAberdeenshire to better understand potential visitors and to track progress against a set of KPIs
- Fieldwork conducted by Taylor McKenzie took place in October 2024
- In total 1,600 consumers completed the survey
- To qualify for taking the survey respondents had to:
 - live in Scotland (excluding Aberdeen / Aberdeenshire), the North of England, Midlands, South East England or London
 - Be aged 18+
 - Be open to taking a domestic holiday or short-break during the next year
- Analysis carried out by Scattered Clouds

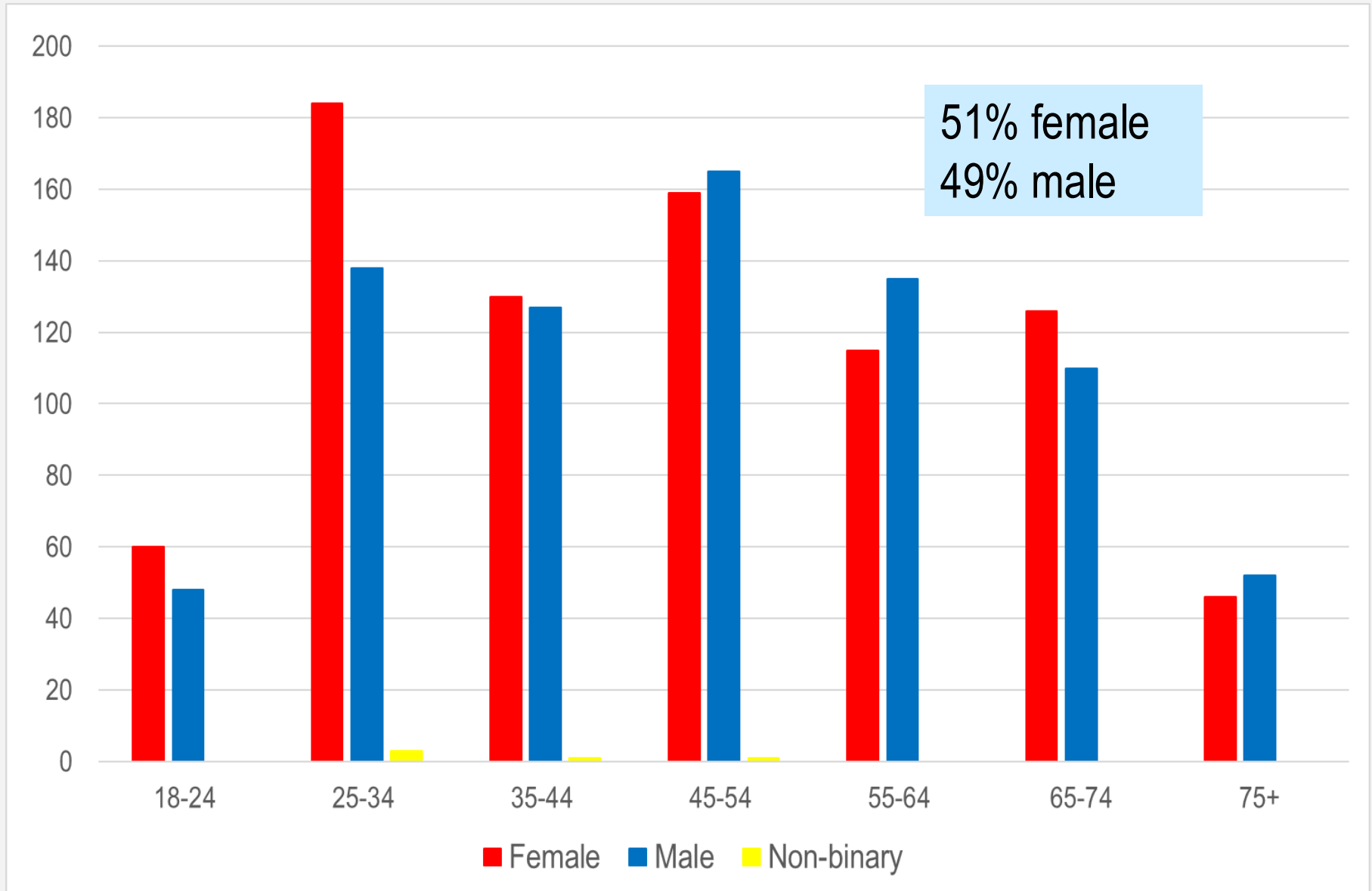
Respondent profile: where resident



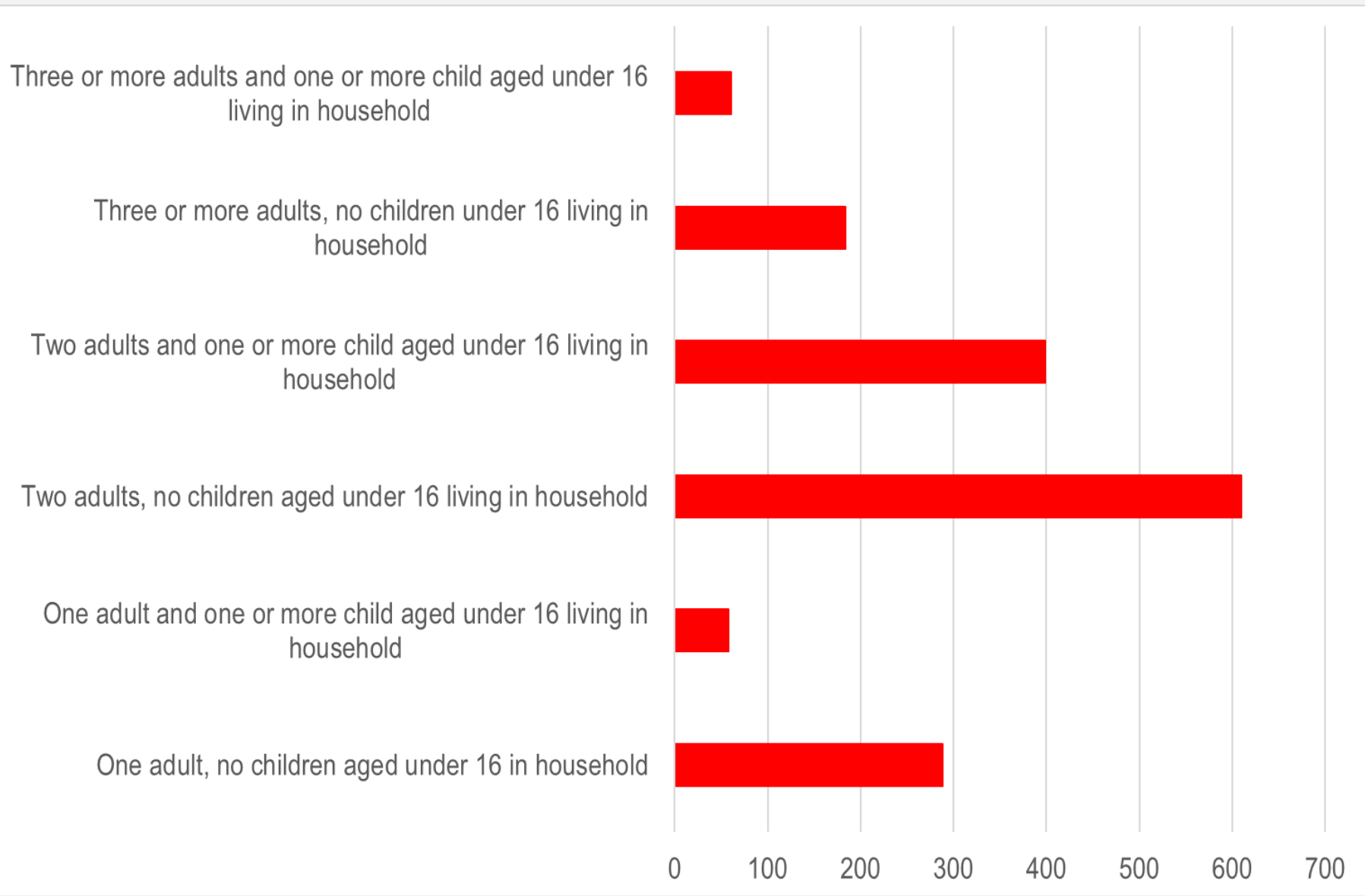
Respondent profile: where in Scotland



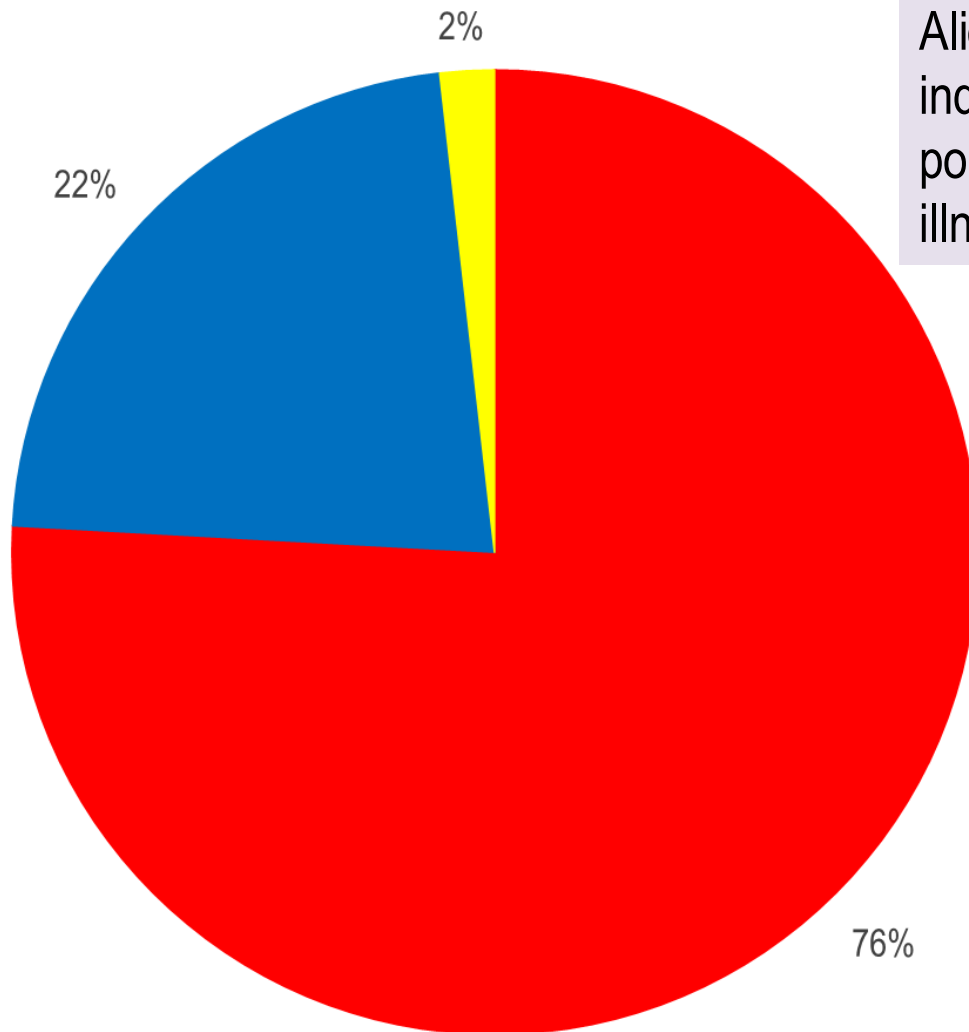
Respondent profile: demographics



Respondent profile: household composition



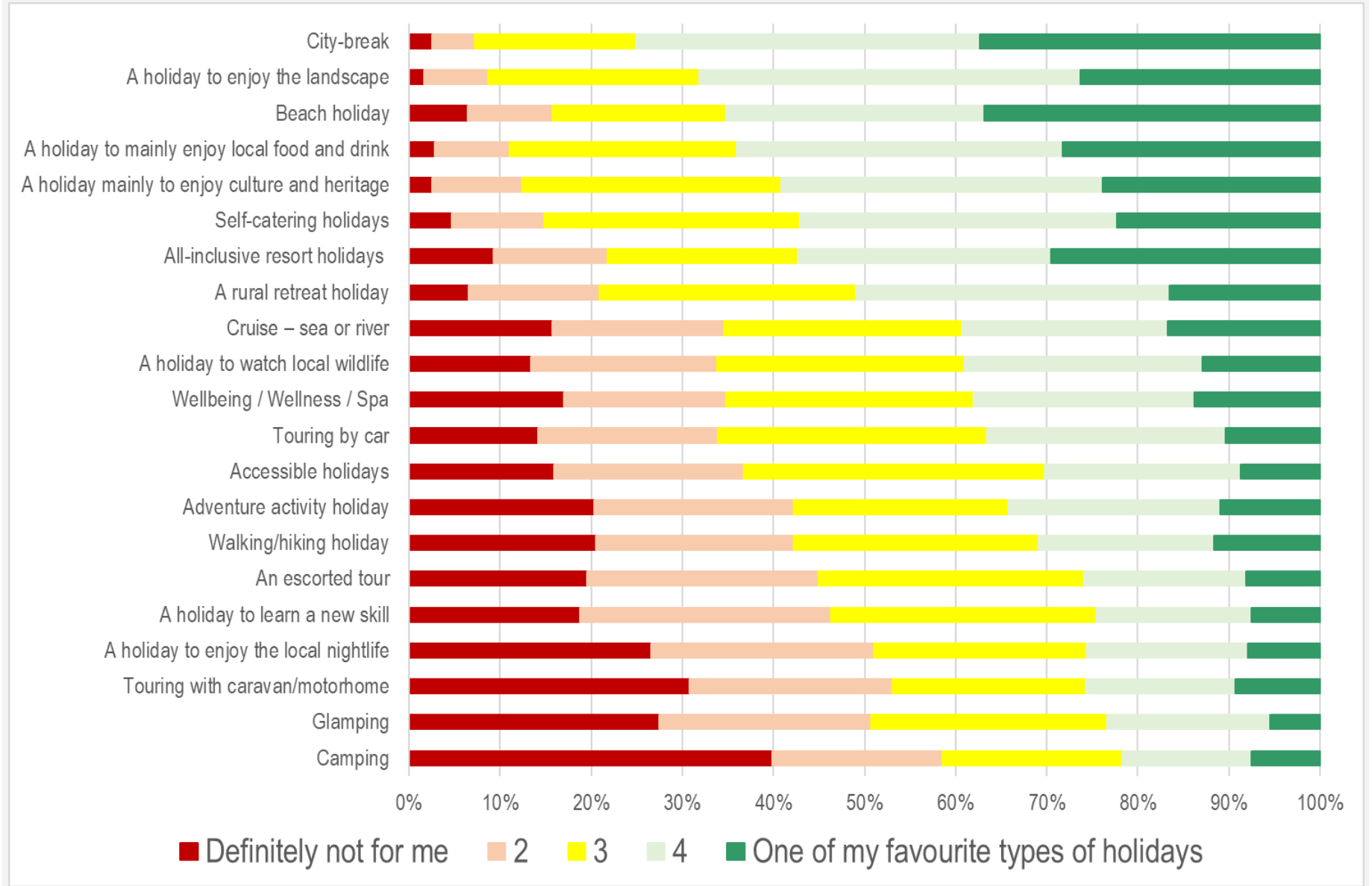
Respondent profile: disability (self, or regular holiday companion)



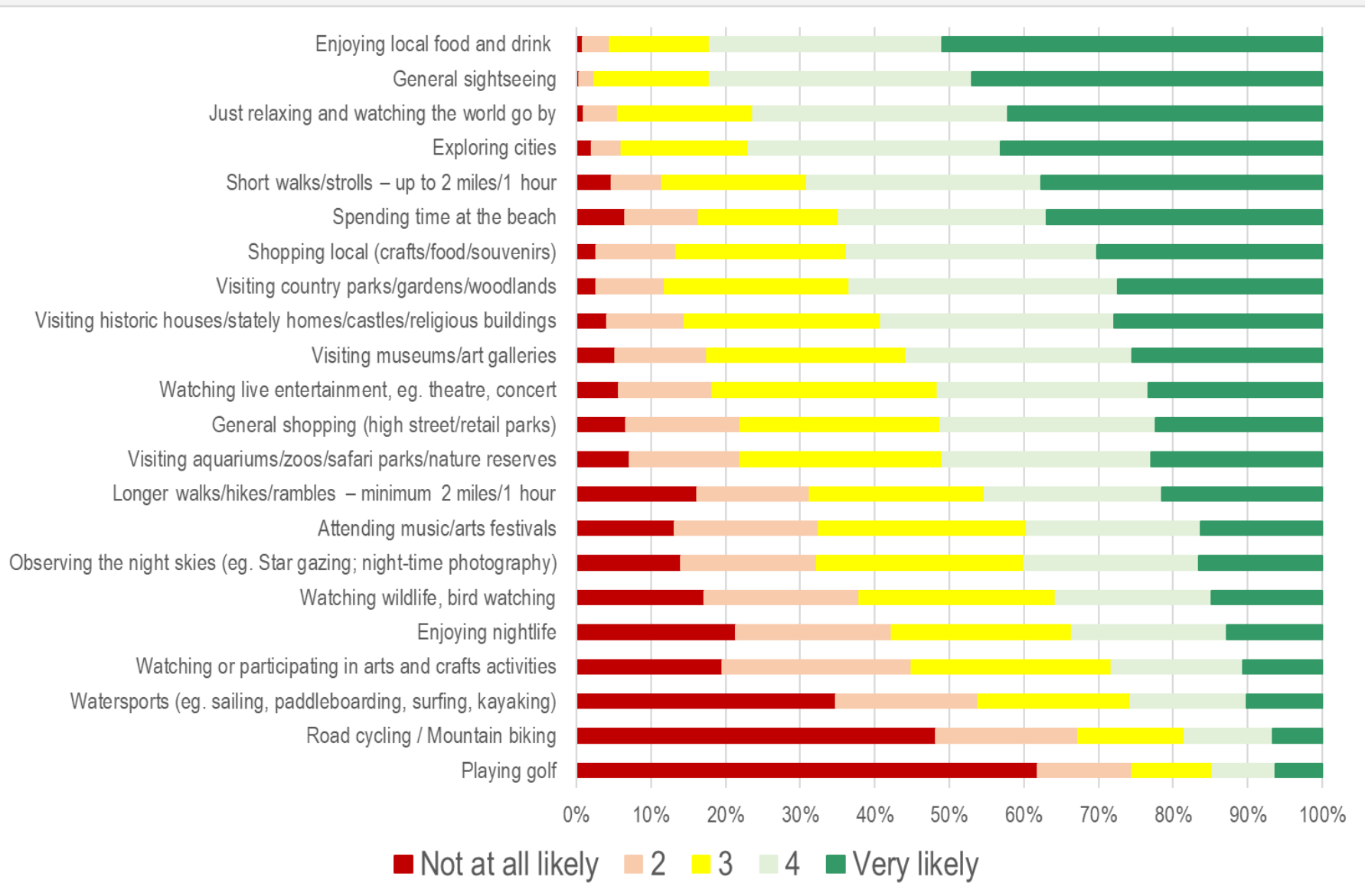
Aligns closely with DWP data indicating that 24% of the UK population has a long-standing illness, disability or impairment

- No
- Yes
- Prefer not to say

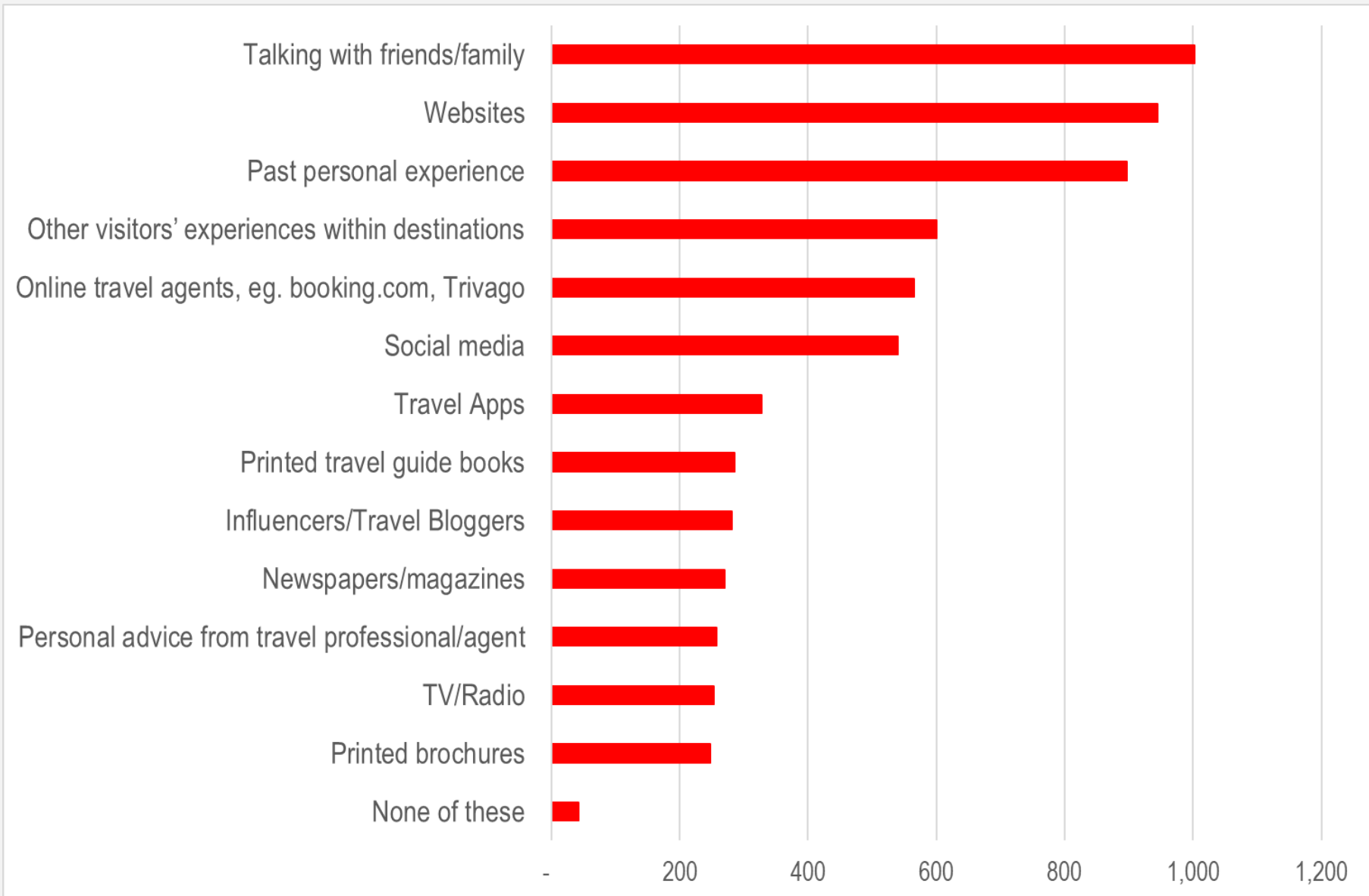
Preference for different types of holiday



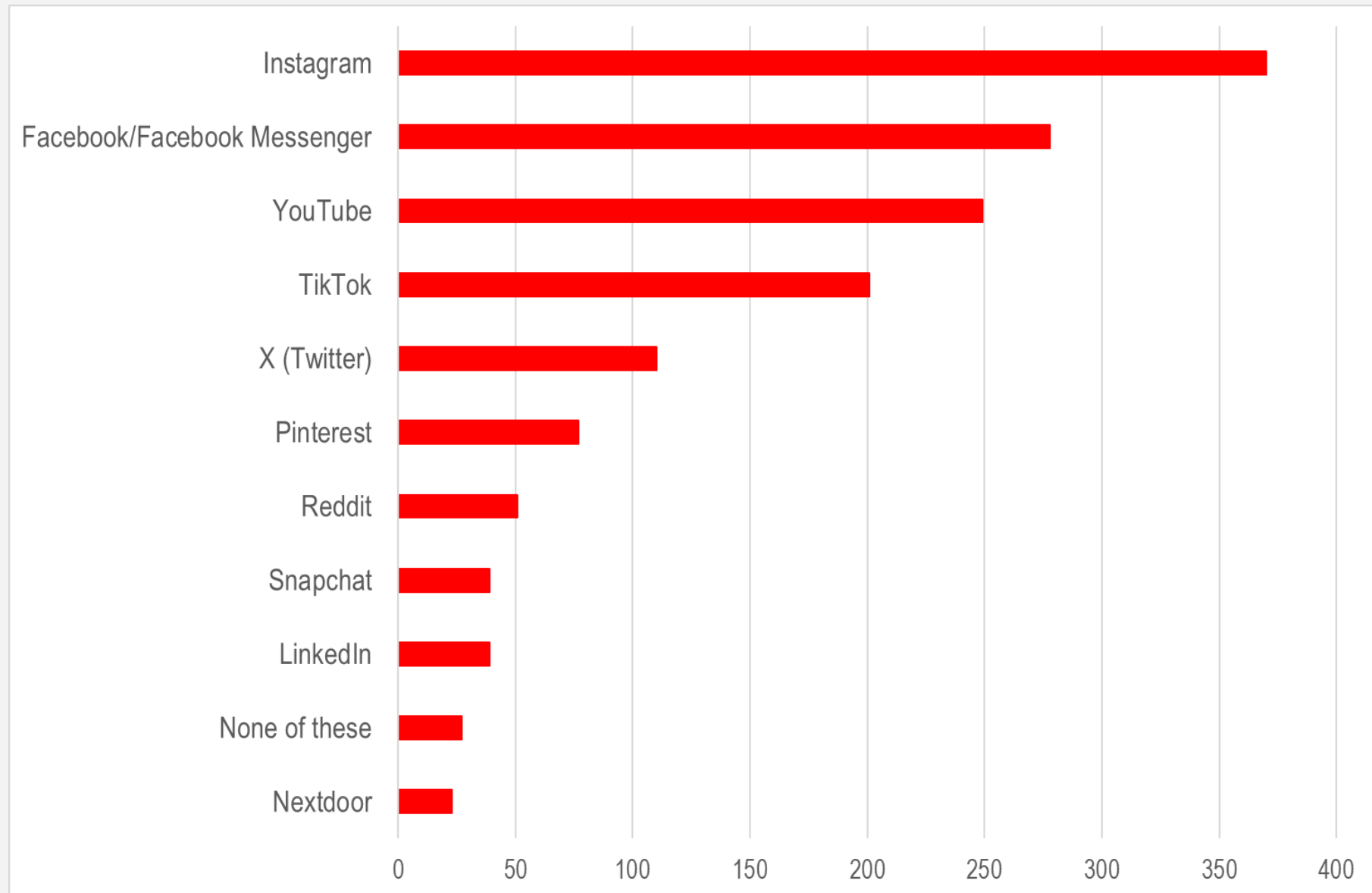
Undertaking holiday activities



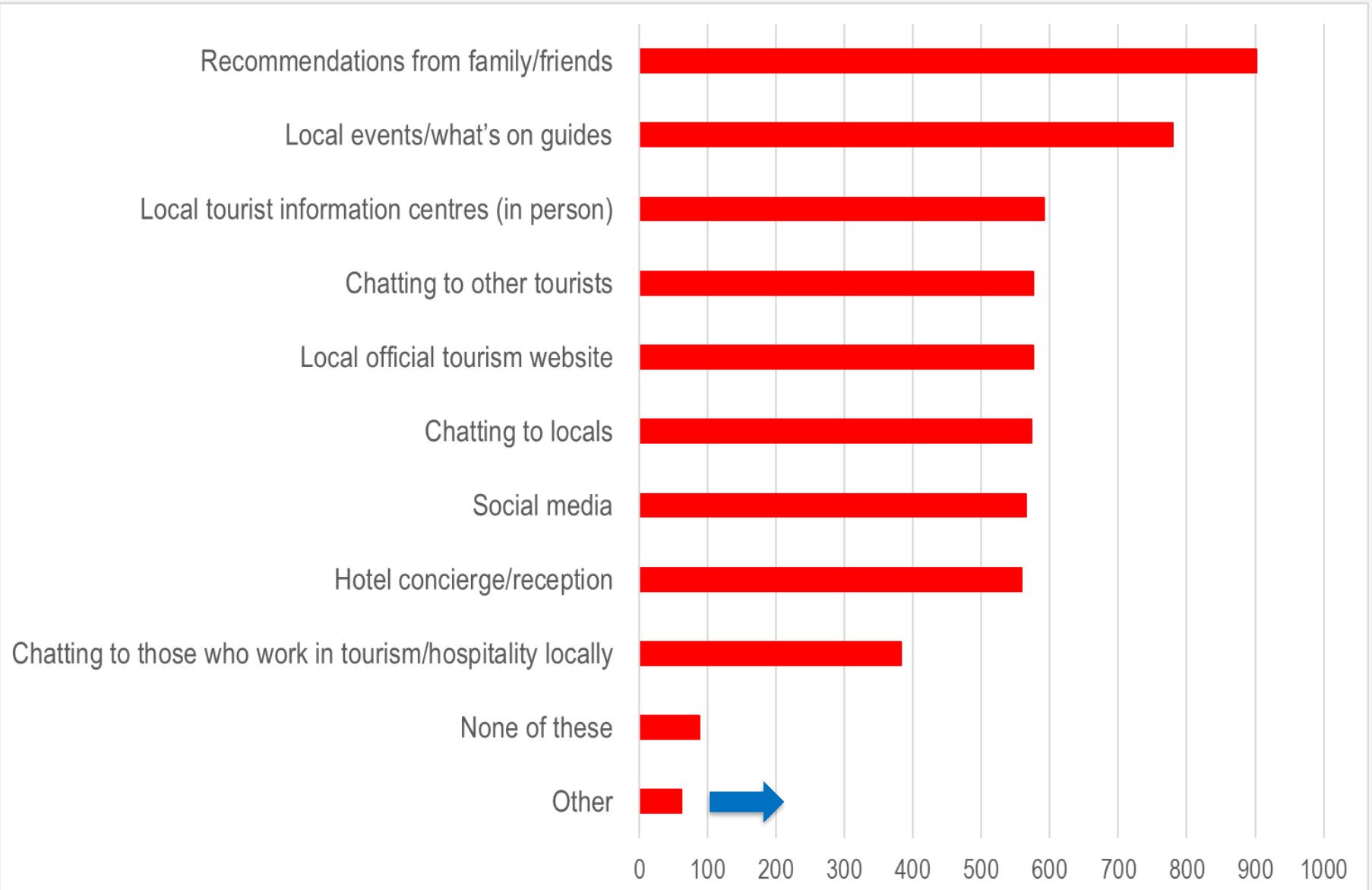
Information sources used to decide where to go



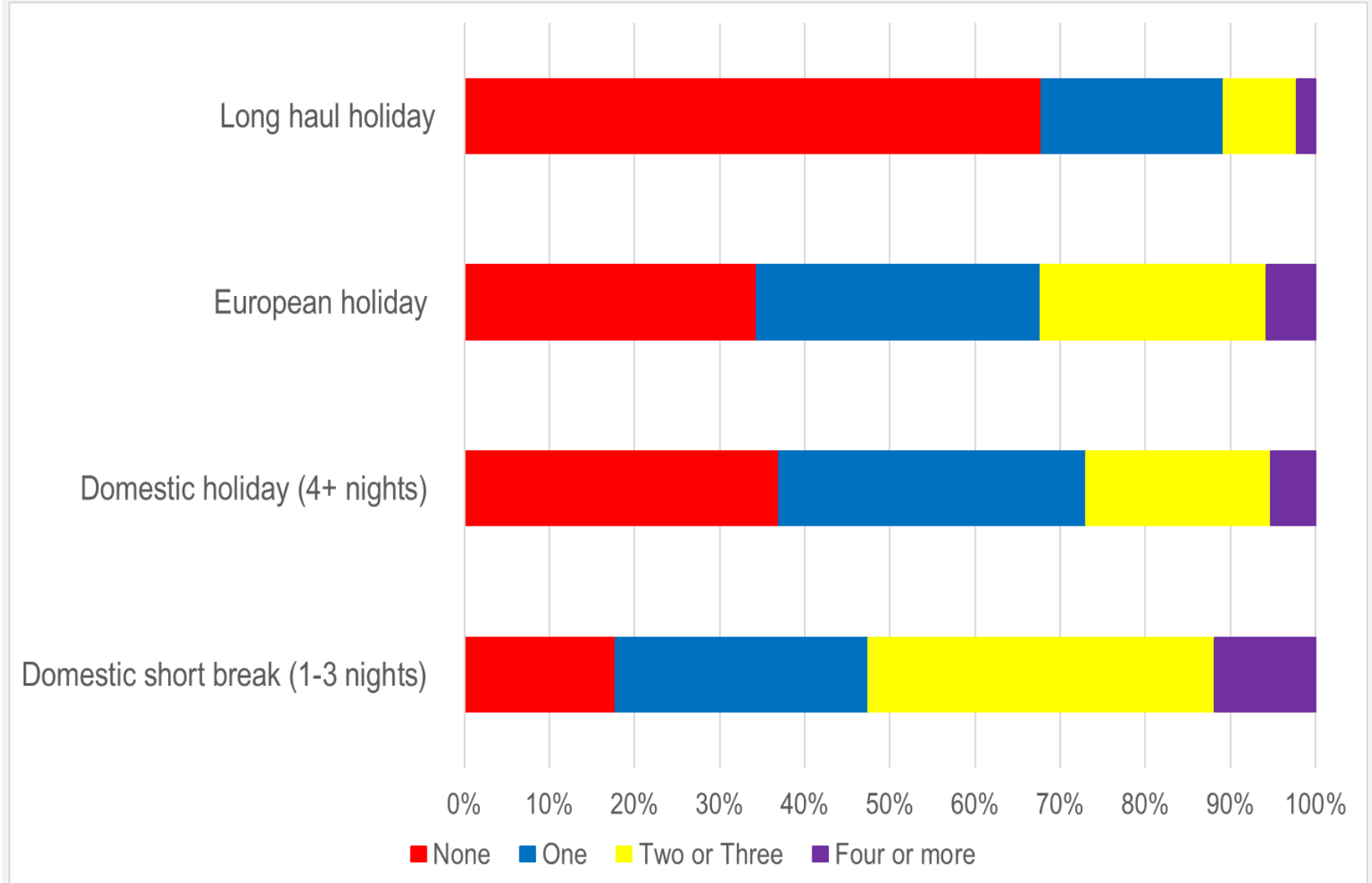
Social media platforms used to decide where to go VisitAberdeenshire



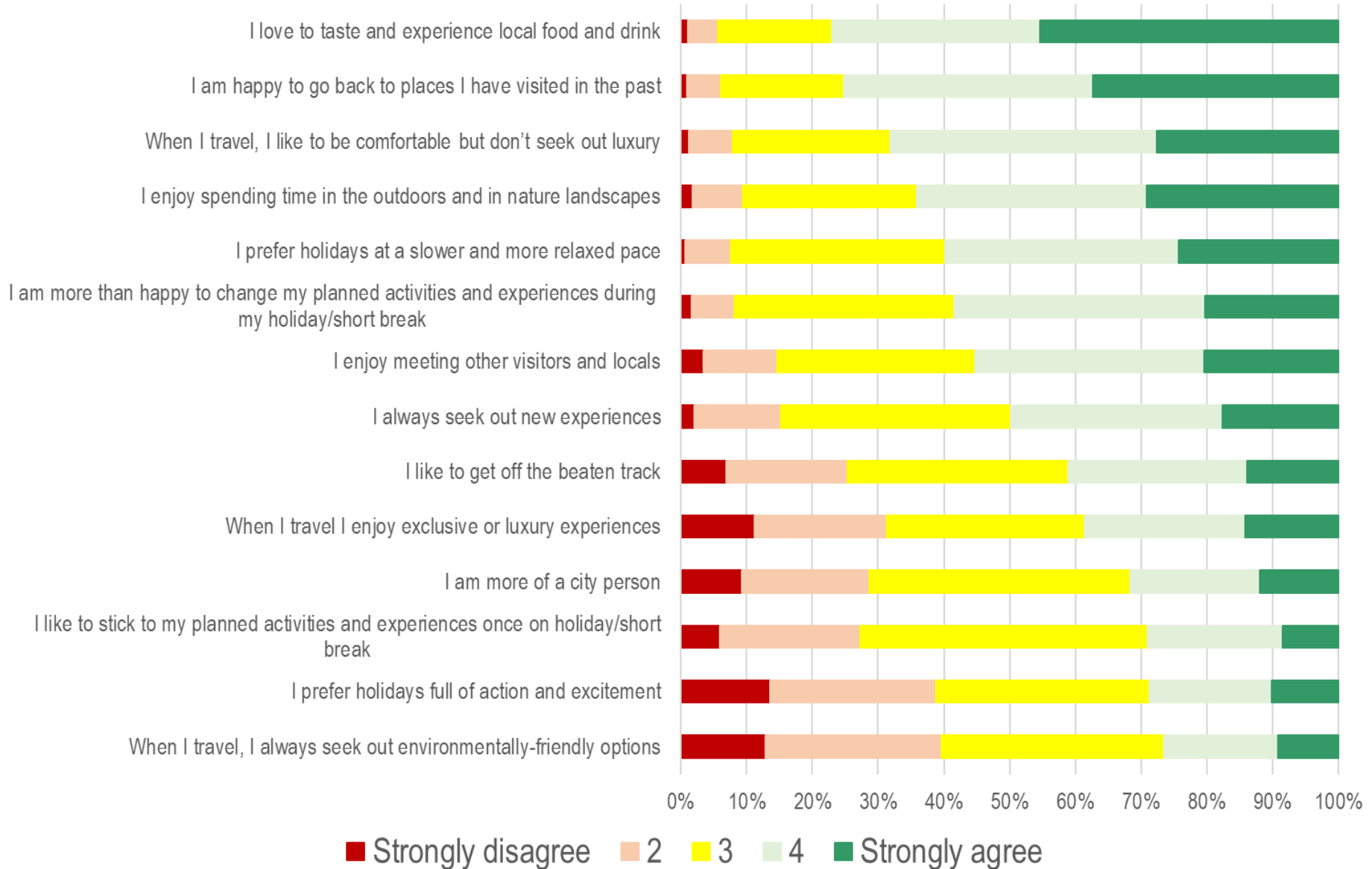
Deciding what to do once at the destination



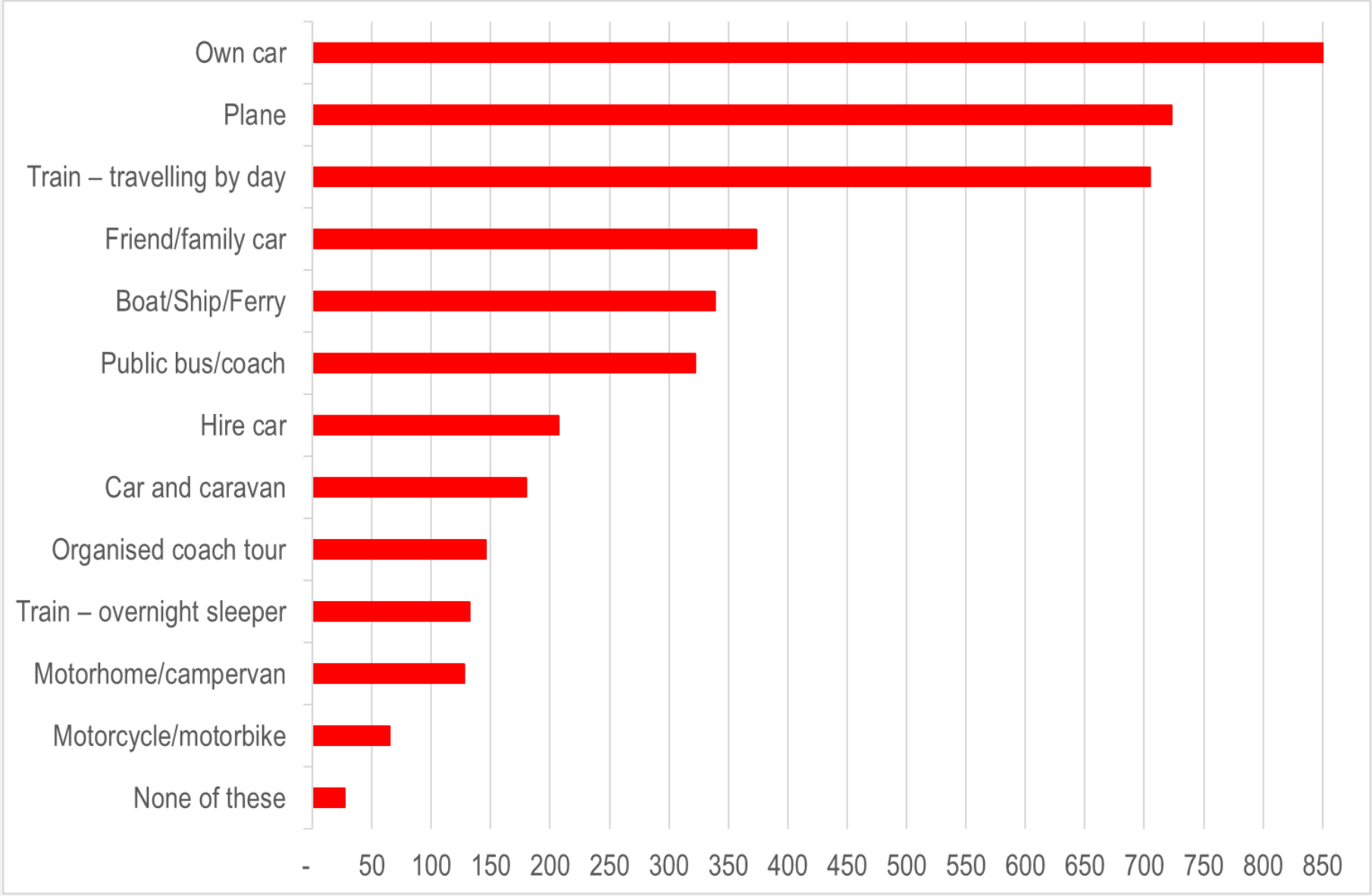
Number of holidays in past year



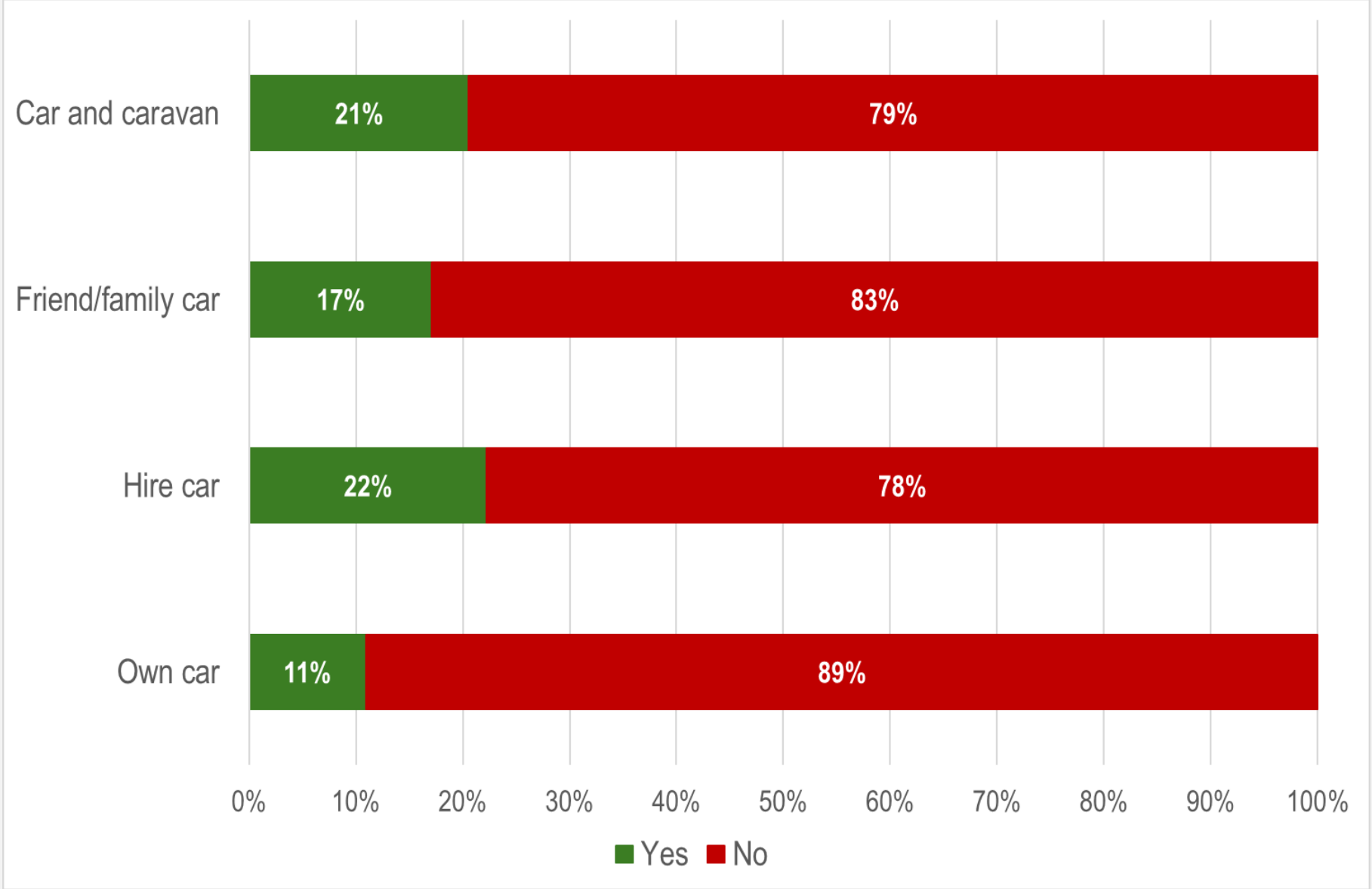
Agree / disagree statements



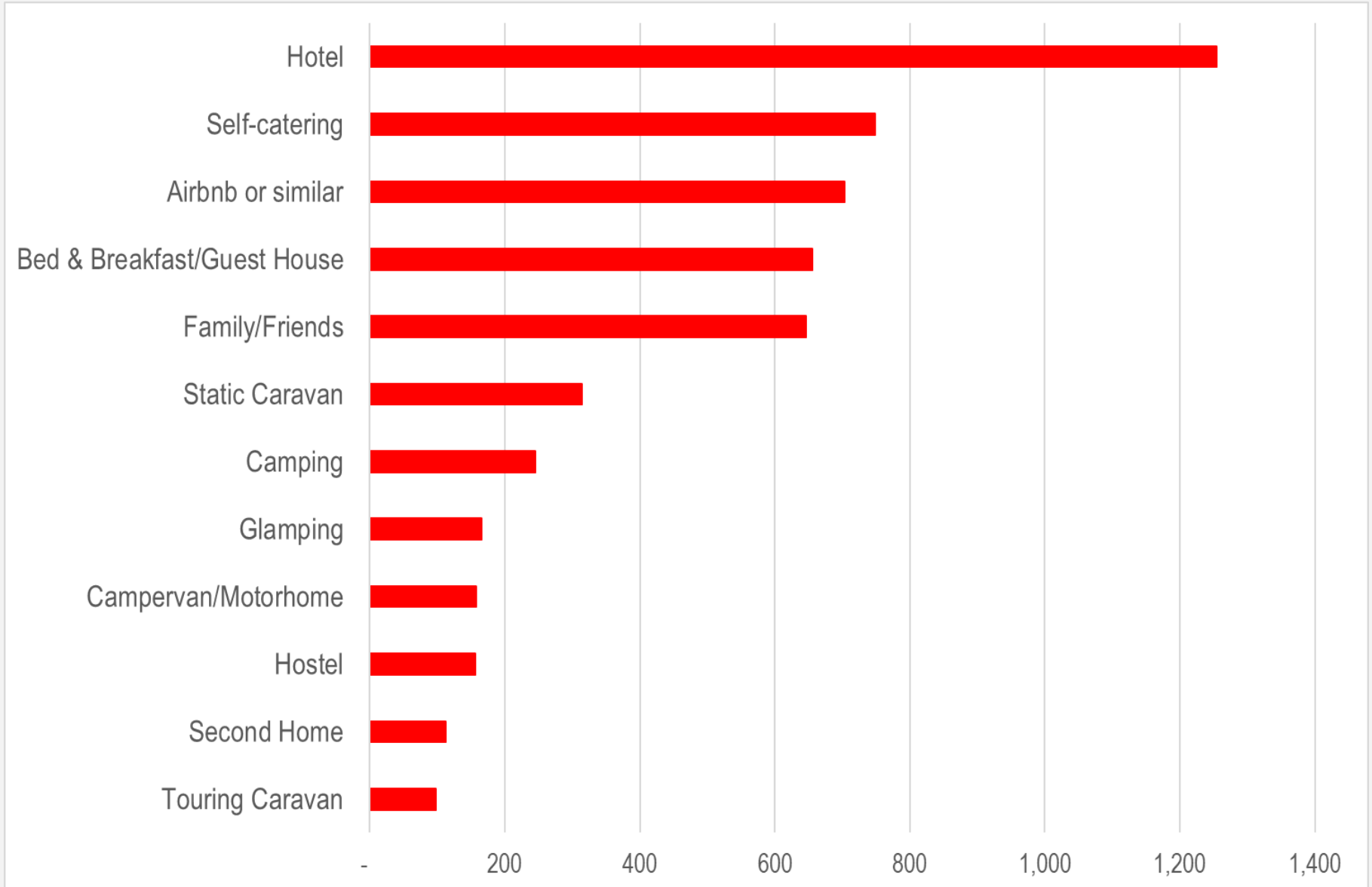
Transport used to reach domestic holiday or short-break destination within the past 3 years



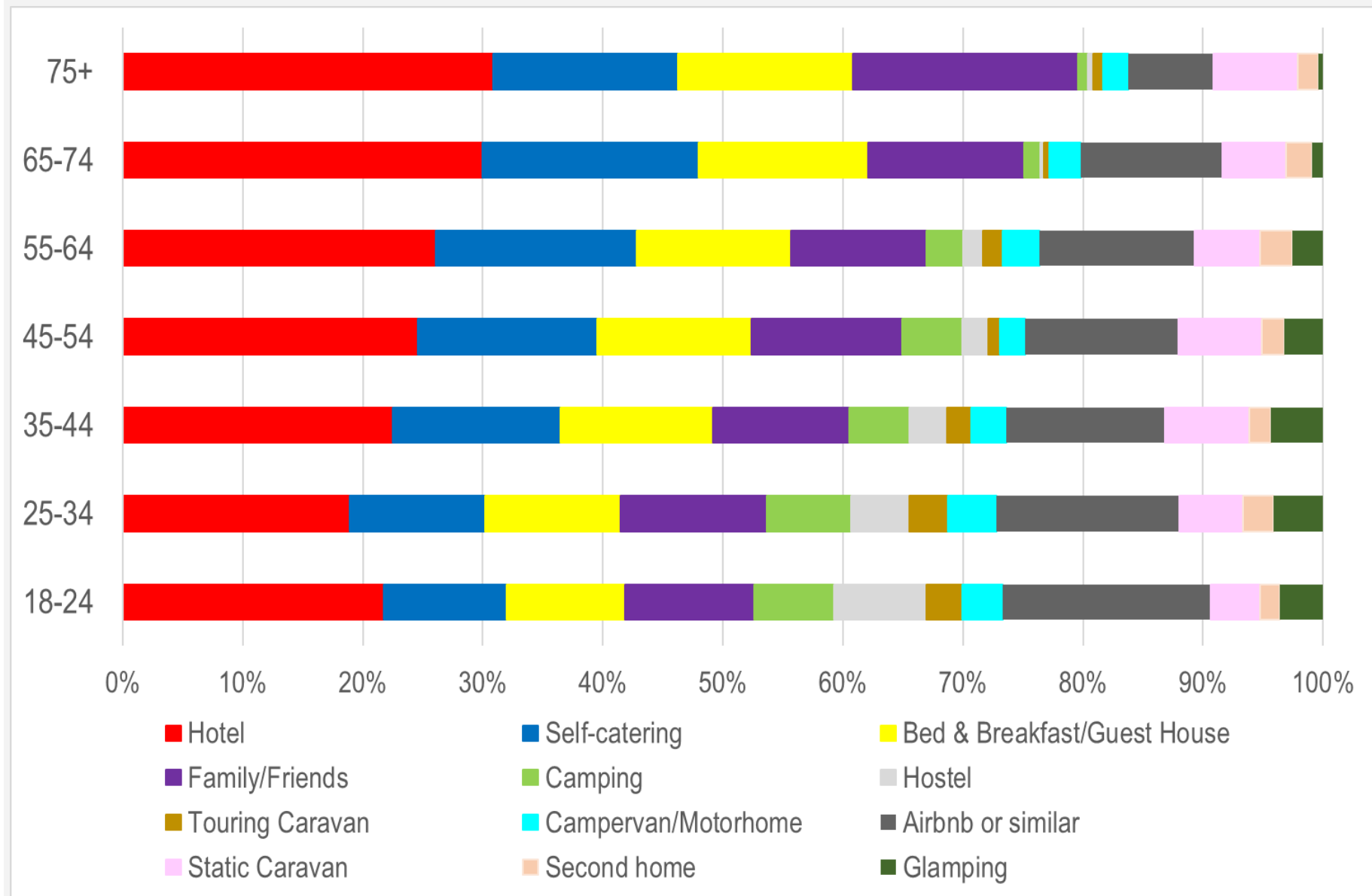
Whether car used was an EV



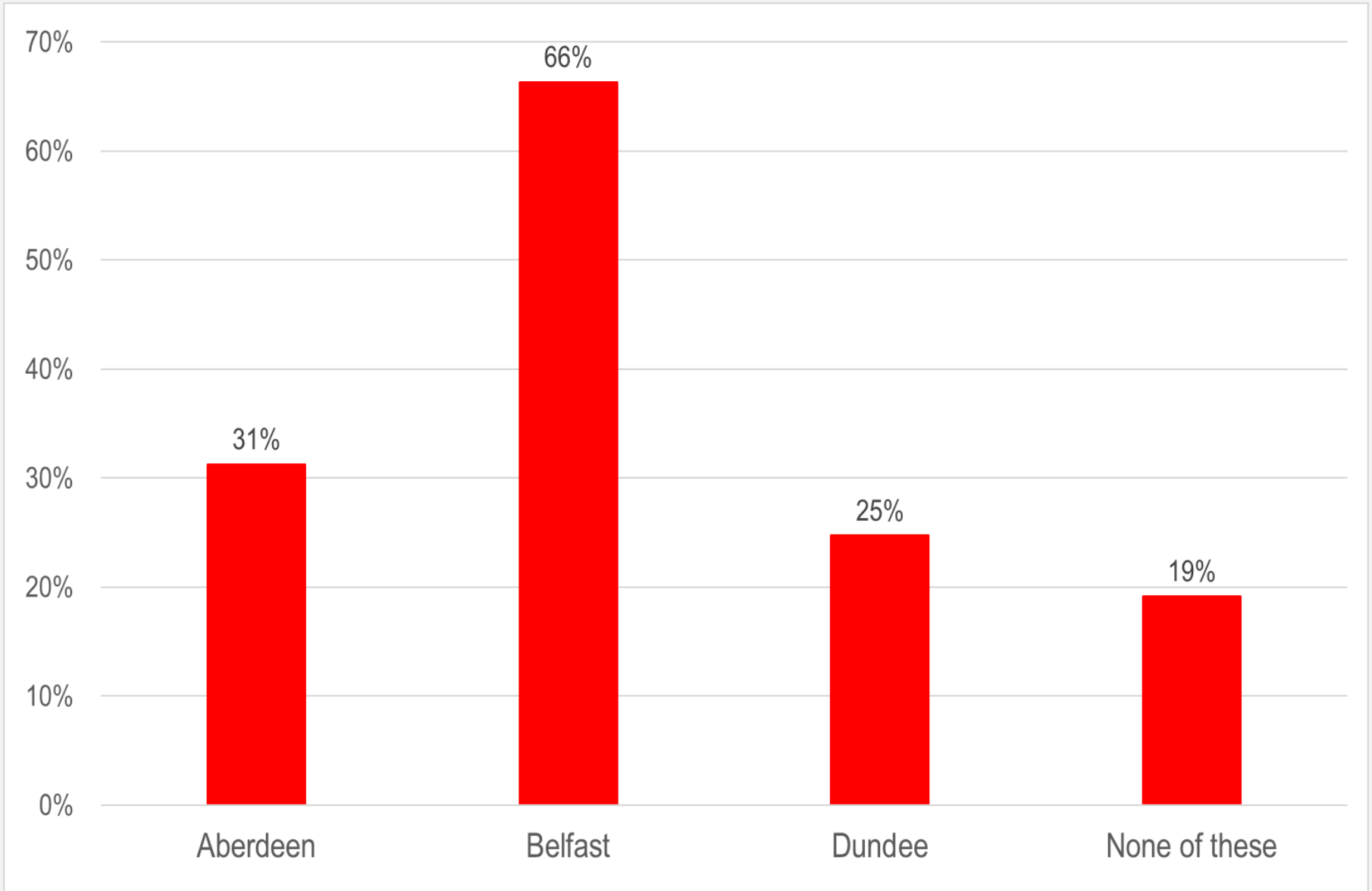
Accommodation used during a holiday or short-break within the past 3 years



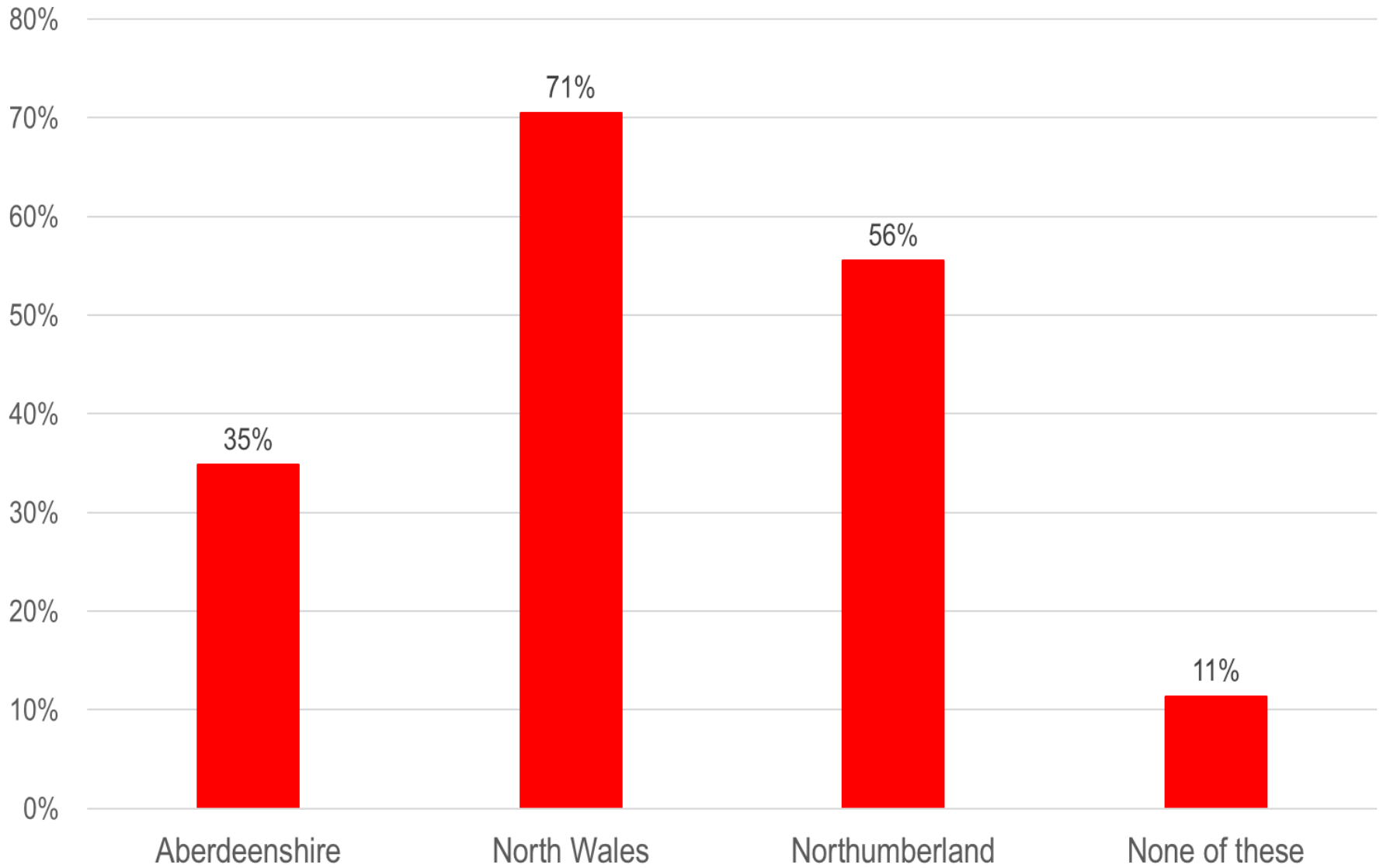
Accommodation used during a holiday or short-break within the past 3 years



Awareness of place as somewhere that might be visited for a holiday or short-break



Awareness of place as somewhere that might be visited for a holiday or short-break

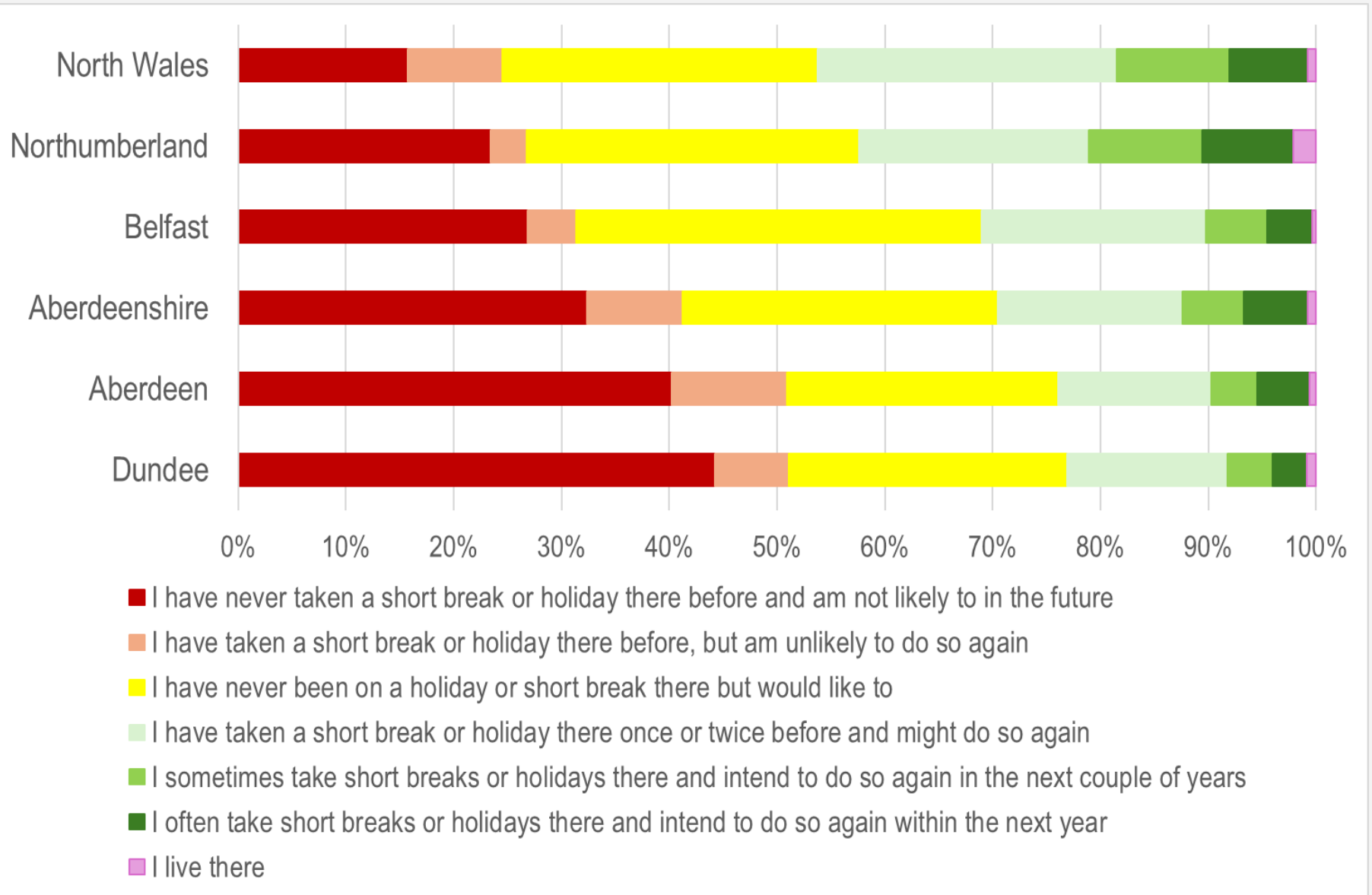


Destination disposition

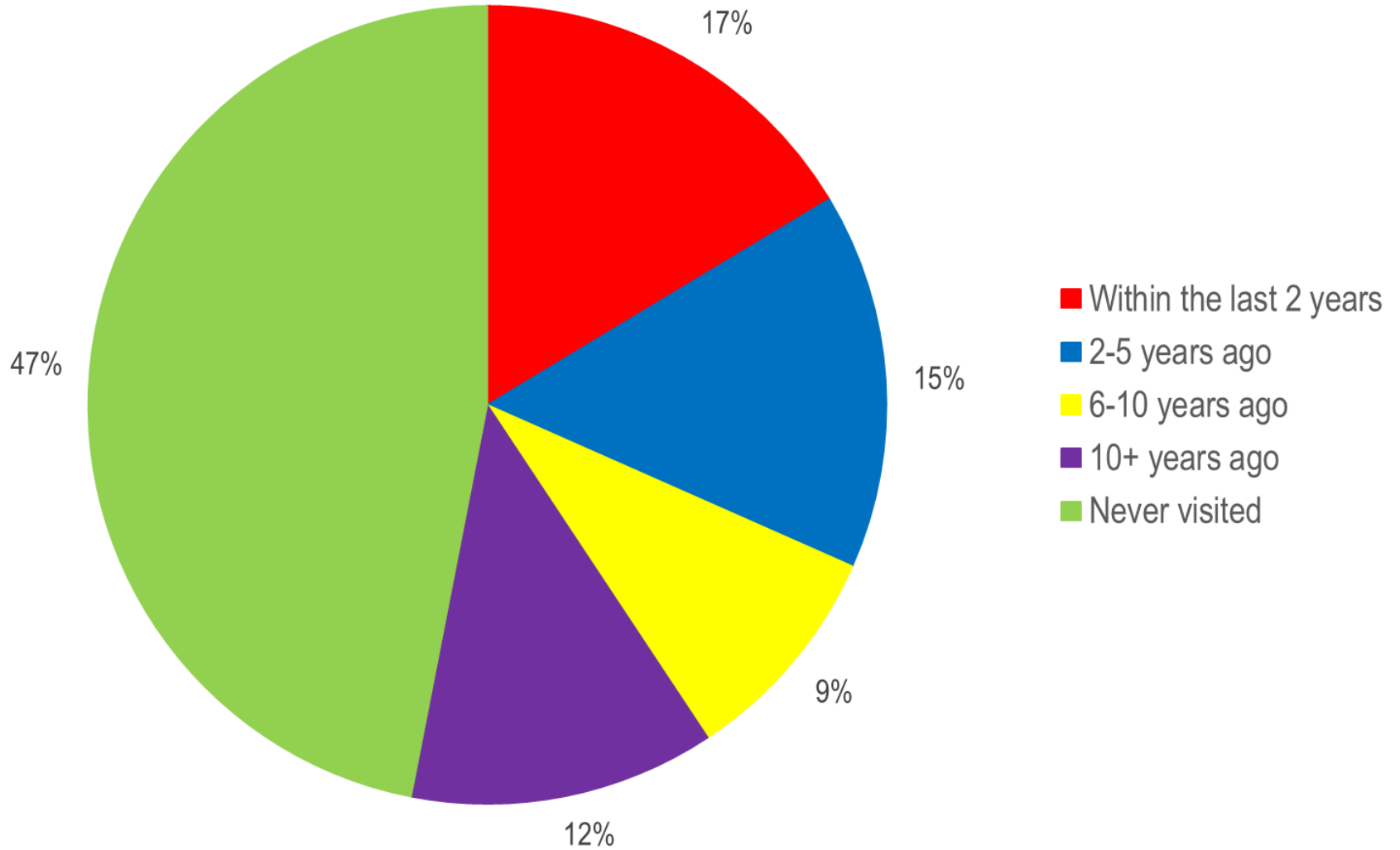
Aberdeen
Aberdeenshire
Belfast
Dundee
North Wales
Northumberland

- I have never taken a short break or holiday there before and am not likely to in the future
- I have taken a short break or holiday there before, but am unlikely to do so again
- I have never been on a holiday or short break there but would like to
- I have taken a short break or holiday there once or twice before and might do so again
- I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
- I often take short breaks or holidays there and intend to do so again within the next year
- I live there

Destination disposition



Previous visit to City or Shire



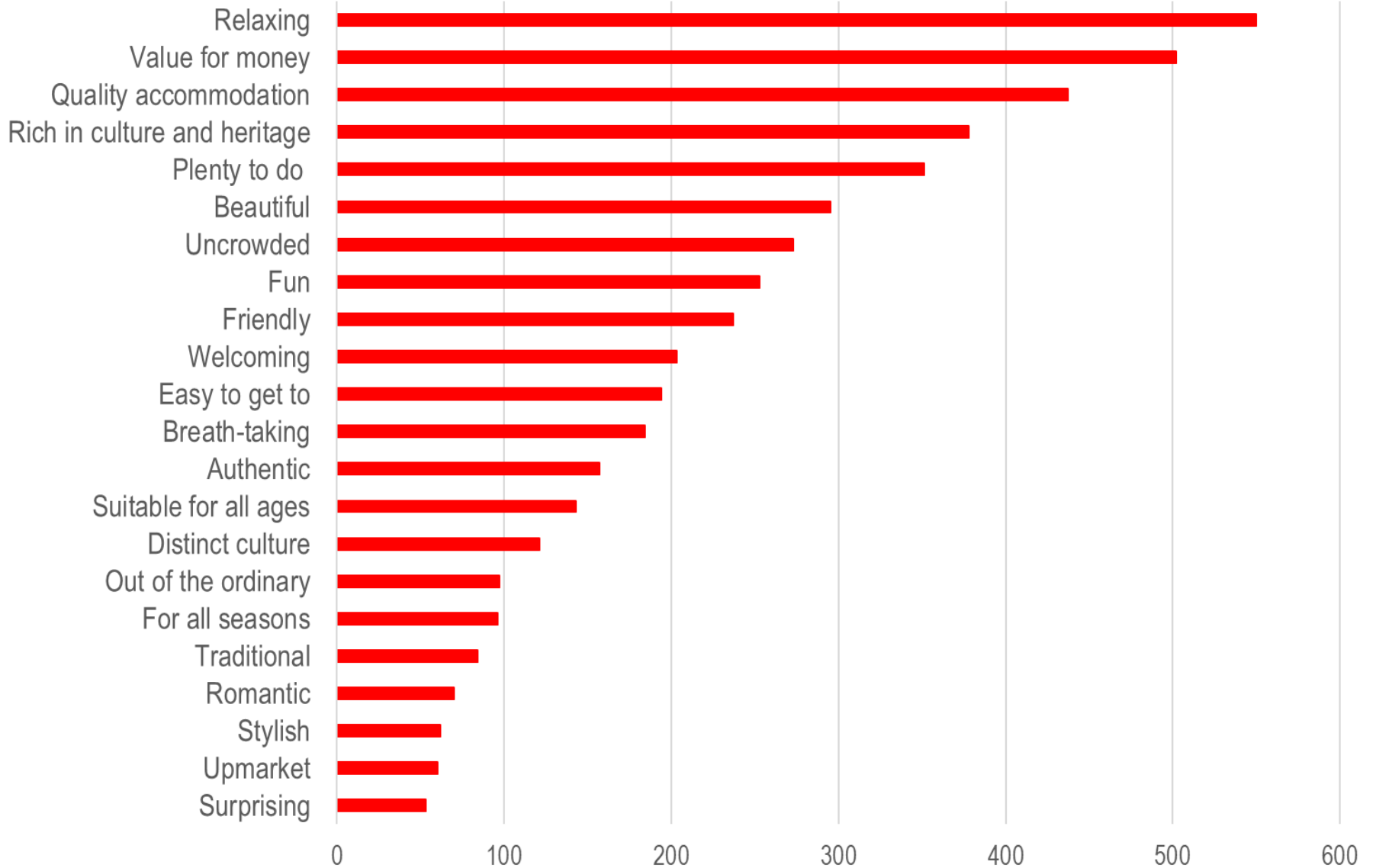
Words and phrases

- Early in the survey respondents were asked to pick up to 3 words or phrases that would describe their ideal holiday or short-break destination
- Later respondents were asked to pick up to 3 words / phrases from the same predefined list that they felt **most** and **least** describe Aberdeen and another city OR Aberdeenshire and another rural destination
- The destination comparison tables are not presented within this deck, but are available upon request: insights@visitabdn.com

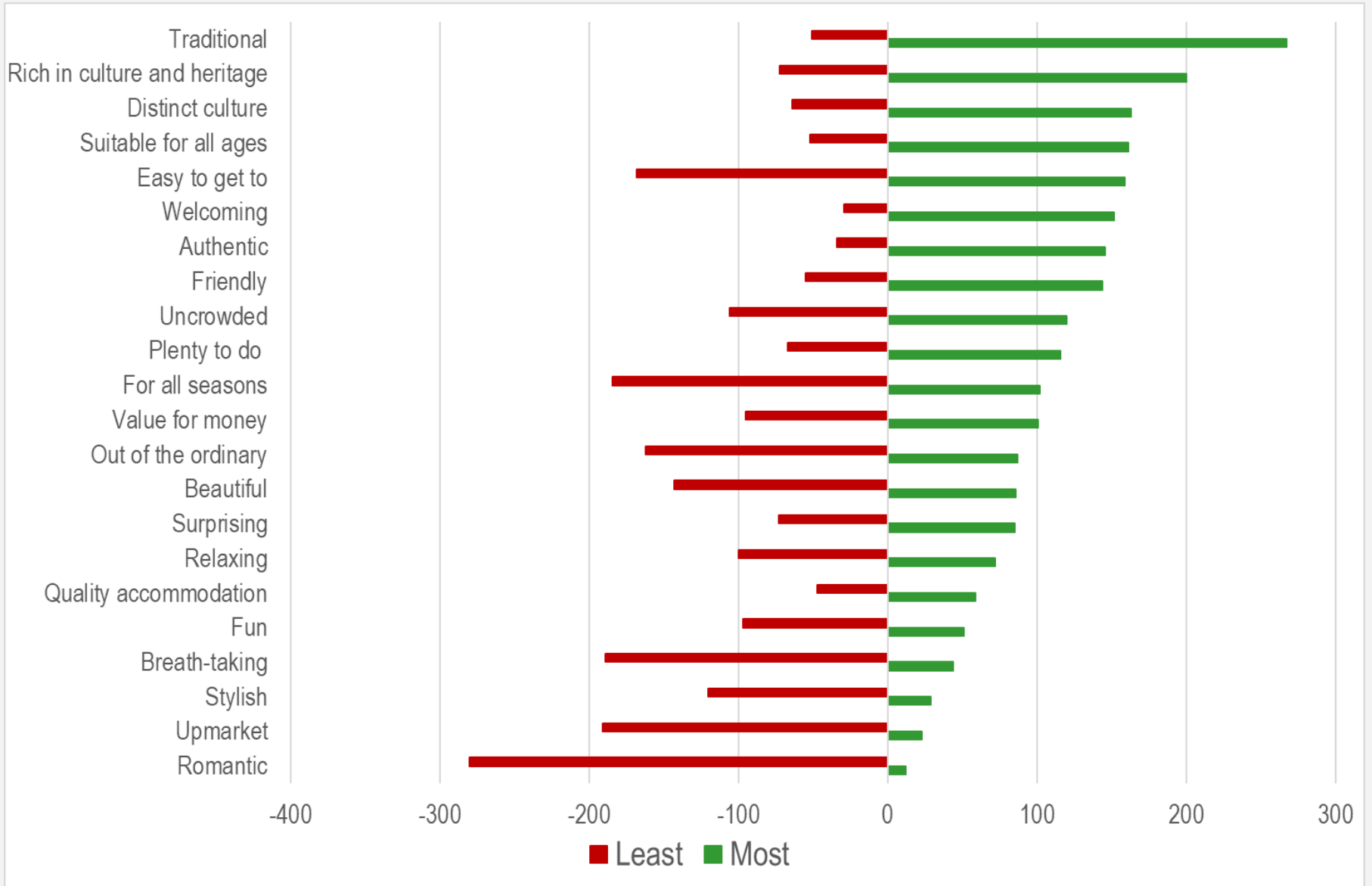
Words / phrases

Authentic
Beautiful
Breath-taking
Distinct culture
Easy to get to
For all seasons
Friendly
Fun
Out of the ordinary
Plenty to do
Quality accommodation
Relaxing
Rich in culture and heritage
Romantic
Stylish
Suitable for all ages
Surprising
Traditional
Uncrowded
Upmarket
Value for money
Welcoming

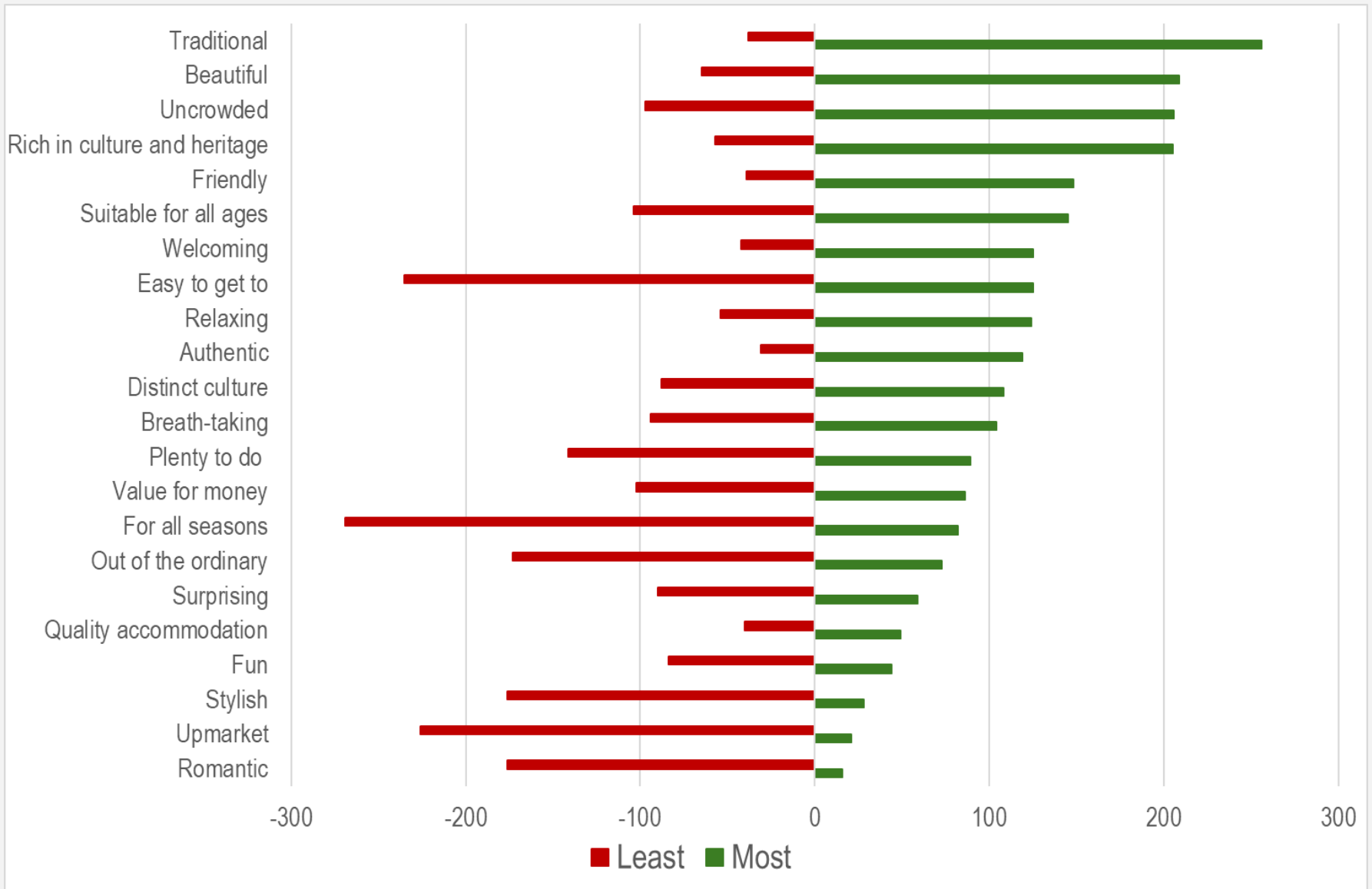
'Ideal' holiday or short-break destination



Words / phrases for Aberdeen City



Words / phrases for Aberdeenshire



How does the region perform against “ideal”



**They don't want it but
think you've got it**

**They want it and
think you've got it**

**Ideally words and phrases
align with the 45° diagonal**

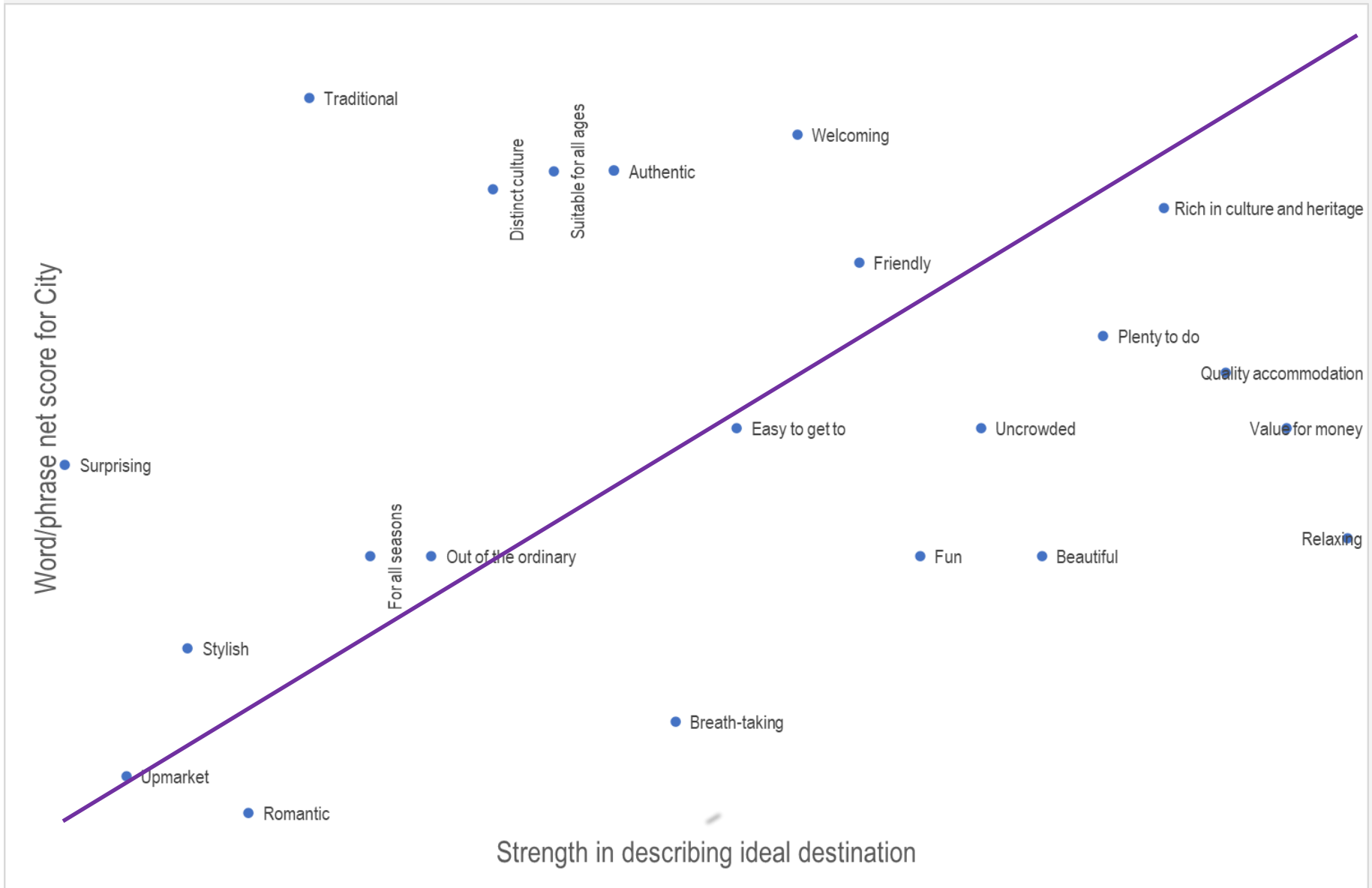
**They don't want it
and don't think
you've got it**

**They want it but
don't think you've
got it**

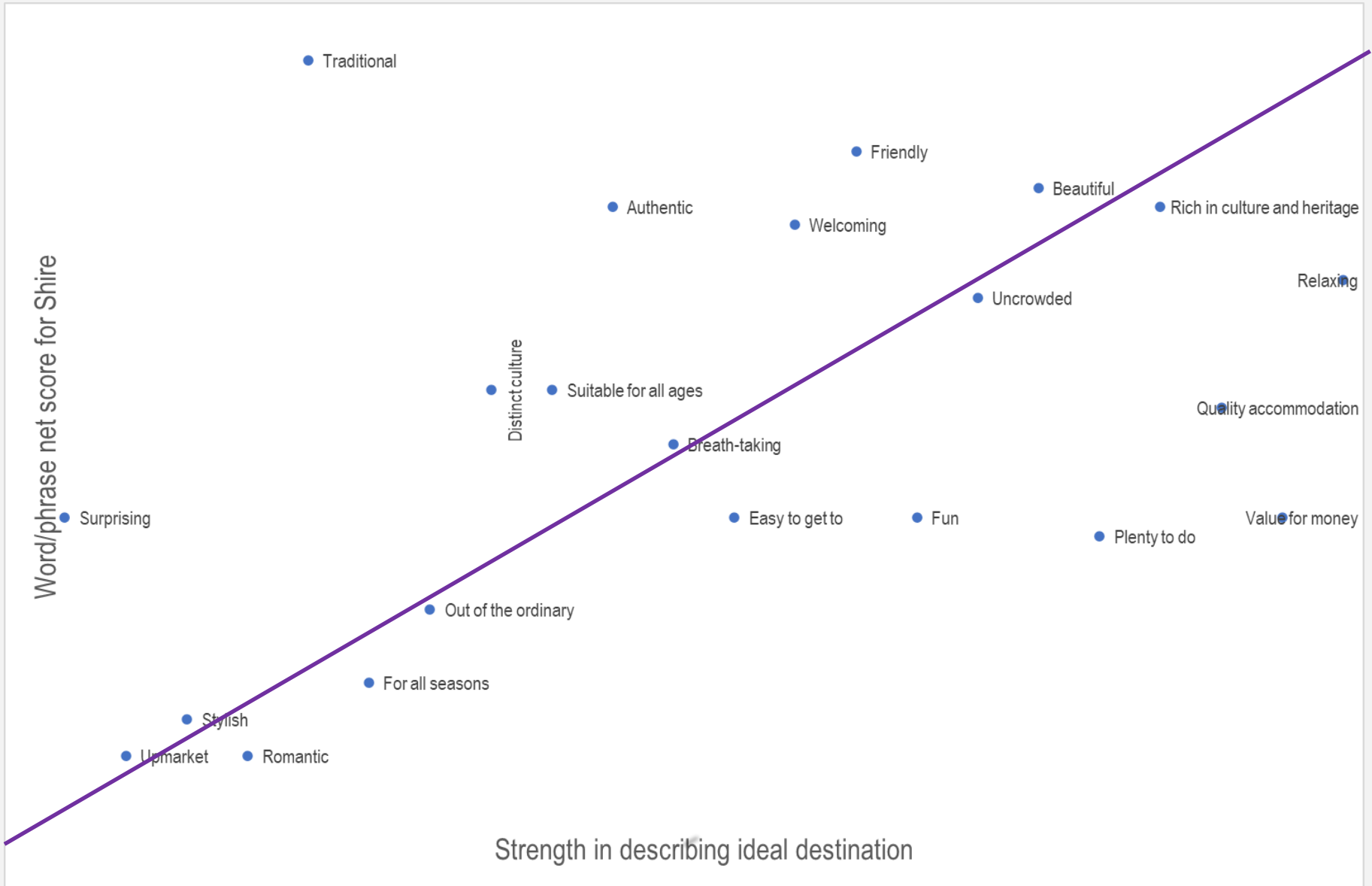
Word or phrase net score Aberdeen City

Strength in describing 'ideal' destination

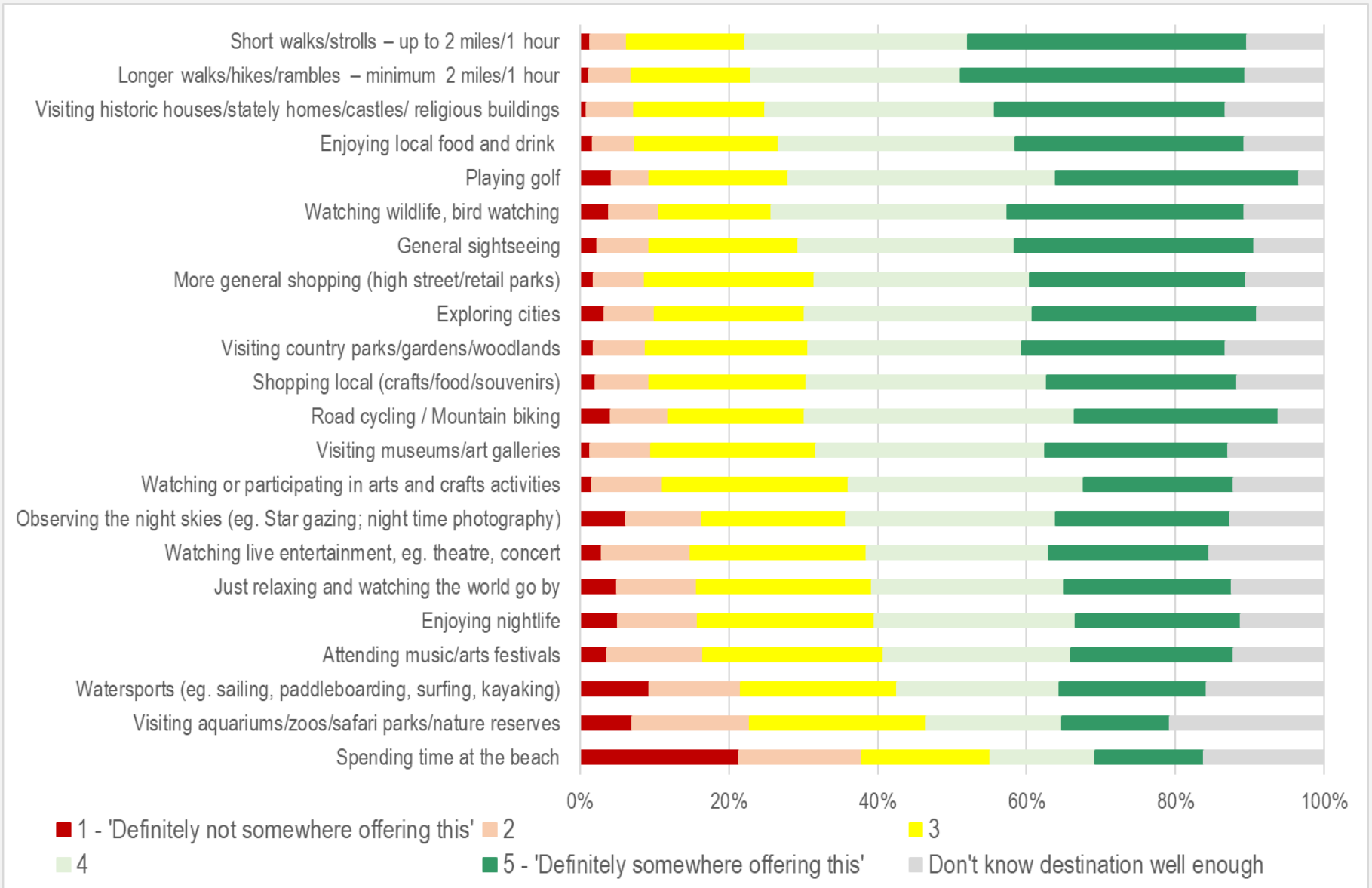
How does the City perform against “ideal”?



How does the Shire perform against “ideal”?



Does City/Shire offer activities that are enjoyed? VisitAberdeenshire



Points to ponder (1)

- Results have remained largely stable across the past 3 years
- The types of holiday respondents tend to favour include city breaks, holidays to enjoy the landscape, beach holidays and those to enjoy local food/drink
- Enjoying local food and drink, sightseeing and watching the world go by are popular holiday activities, while only a minority indulge in water-sports, cycling or golf
- Talking to friends and family, websites and past personal experience heavily influence destination choice, with Instagram the most important social media platform for those influenced by these

Points to ponder (2)

- Recommendations from friends and family, local events/what's on guides and TICs are the most common sources used for deciding what to do once at a destination
- 82% had taken at least one domestic short-break in the past year, 63% a longer domestic holiday, 66% a European holiday and 32% a long-haul holiday, in all cases higher than found by the 2023 survey
- Most are happy to return to places visited in the past, and tasting local food and drink appeals
- Few seek out environmentally friendly holiday options, and most say that they are not after holidays that are full of action and excitement

Points to ponder (3)

- Using an owned car is the most common means of transport used to reach a holiday destination, while staying in hotels is the most often used form of accommodation
- 31% say they are aware that Aberdeen is a place people might visit for a holiday or short-break, with the figure for Aberdeenshire being 35%
- 40% indicated that they never have, nor will in the future, visit Aberdeen with the equivalent figure for the Shire being 33%
- Meanwhile 25% (City) and 29% (Shire) say that although they have not visited in the past they would like to

Points to ponder (4)

- An 'ideal' holiday destination would meet both emotional and functional needs; being relaxing, offering value for money, quality accommodation and somewhere rich in culture and heritage
- The City performs strongly for 'Traditional', 'Welcoming' and 'Authentic', while the Shire scores highly for 'Traditional', 'Friendly' and 'Beautiful'
- The City performs relatively poorly in terms of offering 'Fun', while both City and Shire are not associated with offering 'Value for money'
- The destination is perceived as offering walks, heritage and the chance to enjoy local food and drink among those for whom these are important activities

About the analysis



- These slides have been created on behalf of VisitAberdeenshire by Scattered Clouds who undertook the survey analysis in October 2024