
GRAMPIAN VISITOR SURVEY

1999-2000

SUMMARY REPORT

INTRODUCTION

Tourism is an important part of the Grampian economy. Current estimates suggest that over 20,000 people are employed in tourism related activities in Aberdeen and Grampian and that the combined value of the tourist and day visitor markets to the region is over £450 million annually¹.

In order to develop the area further as a tourist destination it is essential to have a detailed understanding of both the existing and potential visitor markets. On this basis, System Three, an independent market research company, was commissioned by Scottish Enterprise Grampian, Aberdeen and Grampian Tourist Board and Moray, Badenoch and Strathspey Enterprise in 1999 to undertake a programme of research to investigate the motivations, views, characteristics and levels of satisfaction of both current visitors to Grampian and those identified as potential visitors.

Note: It should be highlighted that the research was not intended to provide a measure of the volume and value of visitors to the area but instead a more in-depth look at visitor characteristics and perceptions.

This report presents a summary of key findings from the research, conducted in the 12 month period ending in April 2000. The full details of findings are contained in the main reports which are available from Scottish Enterprise Grampian and on the website
.....

¹ Source: ONS, United Kingdom Tourism Survey, International Passenger Survey and Leisure Day Visits Survey estimates.

OBJECTIVES OF THE RESEARCH

The specific objectives of the research were as follows:

Existing visitors

- gather information on the profile of visitors, their needs, wants and perceptions;
- assess changes and patterns in tourism activity in order to produce base-line information to assist strategic decision making;

Potential visitors

- gain an understanding of their images and perceptions of Grampian;
- identify key market segments for Grampian;
- indicate priorities for promoting Grampian as a visitor destination and for future tourism development.

VISITOR SURVEY

Methodology

This section of the summary presents the main findings to emerge from the Grampian Visitor Survey. It is based on 1,455 face-to-face interviews undertaken over a twelve months' period from May 1999 to April 2000.

Note: When interpreting the survey results it should be borne in mind that the economic environment was not particularly buoyant at the time of the survey and factors such as the strength of the pound may have had an impact on the results. The relatively poor weather conditions during the survey should also be taken into consideration.

The survey covered visitors to Grampian on a holiday trip, those visiting friends and relatives on holiday, those staying away from home overnight on business, and people on a day trip from home. Those respondents staying away from home overnight on business were covered in a separate business survey. Consequently, unless otherwise stated the reference to visitors includes only leisure visitors.

Due to the relatively quiet nature of some interview locations a decision was taken to include residents of Grampian on a leisure day out, on the basis that they were interviewed at locations popular with day visitors and tourists alike. A maximum quota of 20% was used to ensure that Grampian residents did not dominate the sample.

The selection of interview locations was designed to ensure a wide coverage both geographically across the region and by the key visitor types throughout Grampian.

Recognising the importance of the business tourism market to the area, a separate survey of business visitors was also undertaken. A further 240 face-to-face interviews were undertaken with business visitors to the area. The interview locations were also carefully selected to reflect those most likely to be visited by business visitors to Grampian e.g. transport termini and hotels. Where appropriate the results from the business survey have been

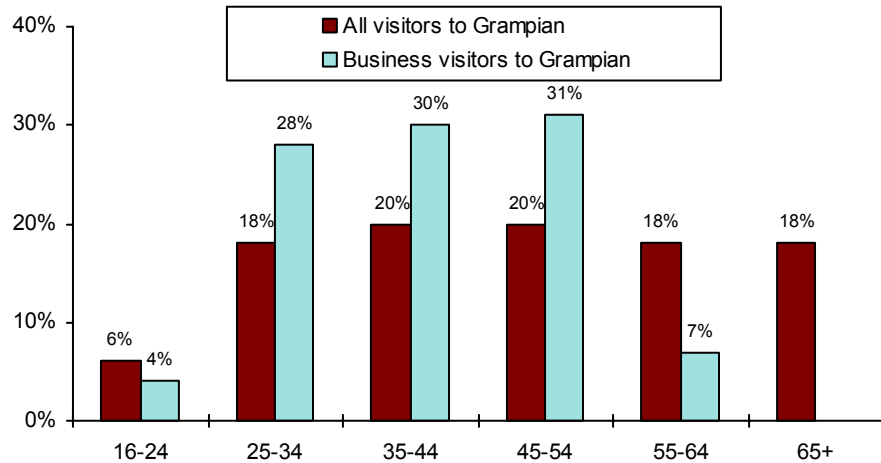
presented alongside those from the main visitor survey. Further details on the business survey are available

Profile of Visitors

Age

Figure -1- Age profile (%)

Base: All respondents (N=1,455 in main survey and N=240 in business survey)



Visitors to Grampian tended to be older with over half of the visitors aged 45 years or over (56%). This compares to the profile for Scotland where 43% of British tourists and 38% of overseas tourists were aged 45 years or over.

The City of Aberdeen and Aberdeenshire North areas attracted a slightly younger profile of visitors than average - 29% and 31% respectively were aged under 35 years compared to 24% in Grampian overall. In Aberdeenshire South there was a slightly older profile of visitors with 41% aged 55+ years compared to 36% of all visitors to Grampian.

In contrast, business visitors were considerably younger with almost 9 out of 10 aged between 25-54 years.

Lifecycle

The following lifecycle segments have been derived from the information obtained from respondents in this survey. Also provided is an indication of the proportion of the sample, which fell into each category:

<i>Young Independents:</i>	Aged under 35 years, single or living with partner, no children in household	14%
<i>Families:</i>	Married or living with partner, any children in household, irrespective of age	20%
<i>Empty Nesters:</i>	Aged 45+ years, living with partner, married, divorced/separated or widowed, no children in household	47%
<i>Working:</i>	- Working full-time or part time, aged 45+ years, living with partner, married, divorced/separated or widowed, no children in household	21%
<i>Retired:</i>	- Retired, aged 45+ years, living with partner, married, divorced/separated or widowed, no children in household	23%

Grampian is particularly appealing to empty nesters with around half of respondents in this category (47%). Some 19% of respondents fell outside these categories. For example, someone who is divorced/separated or widowed with children in the household, or someone aged 35-44 who was not married or living with a partner.

Aberdeen City attracts a higher proportion of young independents (21%). In contrast, the Aberdeenshire North area is more appealing to families with over a quarter of visitors to this area classified as families (28% compared to 17% in Aberdeen City). Visitors to Moray and Aberdeenshire South were more likely to be empty nesters (51% and 52% respectively).

The lifecycle profile of staying visitors is very similar to that for all visitors as shown above.

Newspapers read

Amongst UK visitors to Grampian generally, the Daily Mail and the Sunday Post were the two most popular newspapers with 17% of respondents reading each of these papers. Reflecting the inclusion of Grampian residents in the survey, the Press and

Journal was also mentioned by a significant proportion of respondents (15%).

Party Size

The average party size amongst visitors to Grampian was 2.65 persons. Only around one in eight visitors were on a trip on their own (12%).

On average, around a quarter of visitors to Grampian had children with them (23%). In terms of the individual sub-areas, visitors to Aberdeenshire North were more likely to be accompanied by children (36%) compared to visitors to the City of Aberdeen and Aberdeenshire South where only 15% had children in their party.

Origin of Visitors

Table 1- Origin of visitors (%)

Base: All respondents (N=1,455)

	City	South	North	Centra l	Moray	Grampian LEC	Total Staying	Tota l
Scotland:	46	37	43	45	39	43	29	42
- Grampian	15	11	14	17	14	13	2	15
- Glasgow and Strathclyde	9	8	9	9	8	8	8	9
- Elsewhere in Scotland	19	12	14	14	11	14	12	13
England:	28	38	37	32	36	34	42	34
- South East (inc Greater London)	13	10	10	13	14	12	14	12
- Elsewhere in England	10	17	17	9	15	13	17	14
Other UK:	2	2	1	2	1	1	2	1
Total Overseas:	24	24	19	21	23	22	27	23
- Europe	12	13	10	12	14	12	15	13
- Rest of the World	12	11	9	9	10	10	12	10
Total:	100	100	100	100	100	100	100	100
Base:	263	261	234	265	432	1,023	1,201	1,455

* - less than 0.5%

- - nil respondents

Note: When interpreting these figures it should be remembered that the proportion of Grampian residents was restricted to a maximum of 20% to ensure that the sample was not dominated by the views of local residents.

Scotland was the main source of visitors to Grampian (42%). The largest proportion of Scottish visitors were from within the area

itself (15%). A lower proportion of business visitors were from Scotland (24%).

England accounted for the next largest proportion of Grampian's overall visitor market, with around a third of the visitors to the area coming from here (34%). Within England the main population belt of the South East, including Greater London was the main source of visitors (12%). England was the main source of business visitors, accounting for over half of this market (52%).

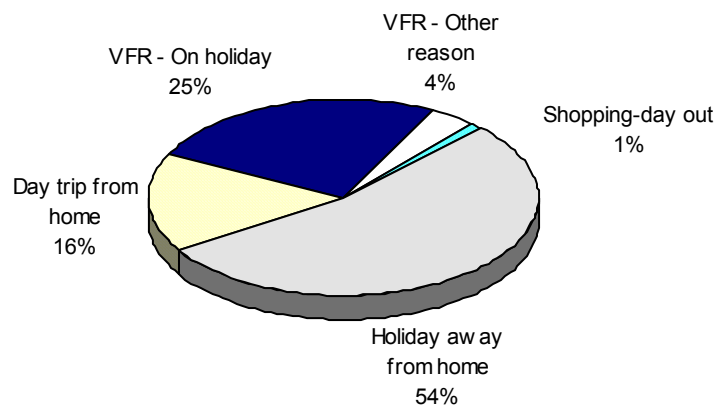
Just under a quarter of visitors to Grampian came from *overseas* (23%). Germany was the main country of origin of European visitors (5%) while the USA was the main source of visitors from further afield (5%).

There was a considerably lower proportion of Scottish visitors amongst staying visitors i.e. those one night from home (29%), while a higher proportion of staying visitors were from England (42%).

Characteristics of Visit

Purpose of Trip

Figure -3 - Purpose of Trip (%)
Base: All respondents (N=1,455)



Just over half of visitors to Grampian (54%) were on a "pure holiday" (excluding VFR). A further quarter of respondents were visiting either friends or relatives but classifying their visit as a holiday (25%). By including those who were on a 'duty visit' to see friends or relatives, some 29% of Grampian visitors were visiting friends and relatives. Around one in six respondents were on a day trip from home (16%) with only 1% of visitors shopping on a day out.

Just under half of visitors on a holiday were on a main holiday (47%), while a slightly higher proportion were on a secondary or additional holiday (52%).

Over half of business visitors to Grampian were on a business trip (55%), excluding those attending a conference, exhibition etc.

The purpose of trip profile varied somewhat over the sub-areas:

Table 2 - Purpose of trip (%)

Base: All respondents (N=1,455)

	Cit y	South	Nort h	Centra l	Moray	Grampian LEC	Total Stayin g	Tota l
Day out/day trip from home (min 3hrs)	20	12	15	21	15	17	-	16
On holiday away from home	35	62	47	46	67	47	65	53
Visiting friends and relatives - on holiday	35	23	36	29	13	31	31	25
Visiting friends and relatives - other reason	10	3	3	3	3	5	5	4
Shopping day out	2	-	-	-	2	*	-	1
Total:	100	100	100	100	100	100	100	100
Base:	263	261	234	265	432	1,023	1,201	1,455

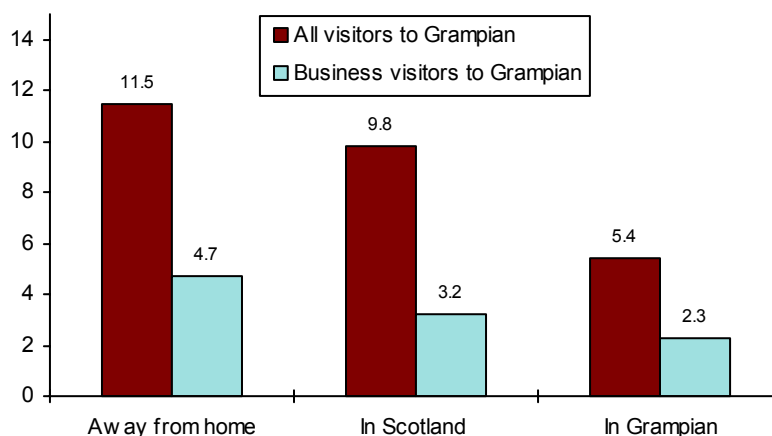
- - nil respondents

Length of Stay

On average, those visitors who were staying away from home, were doing so for some 11.5 nights. Not surprisingly, overseas visitors spent significantly longer away from home (21.1 nights). On average business visitors were spending 4.7 nights way from home.

Figure 4 - Length of Stay (nights)

Base: Those staying away from home (N=1,201 in main survey and N=240 in the business survey)



As shown above, visitors staying away from home were spending most of their time in Scotland with the average length of stay of 9.8 nights. This compares to Scotland where the average length of stay amongst British tourists was 5.2 nights.

Overall, almost two in ten of those respondents who were staying away from home in Scotland were staying overnight in Grampian (16%). The average length of stay in Grampian was 5.4 nights.

Reflecting their longer time away from home, overseas visitors stayed for the longest period in Grampian (6.3 nights).

Accommodation Used in the Area

Those respondents (69% of the sample) who were spending at least one night in Grampian were then asked what type of accommodation they had already used or intended to use during their visit:

Table 3- Type of accommodation used in Grampian (%)

Base: All visitors spending at least 1 night in Grampian (N=998)

		City	South	North	Central	Moray	Grampian LEC	Total
Staying with friends/relatives		42	28	40	39	27	37	34
Bed and breakfast		12	16	15	14	22	14	16
Hotel/motel (< 50 rooms)		14	13	12	16	17	14	14
Self-catering flat/house/cottage		2	9	13	11	16	9	11
Hotel/motel (50+ rooms)		19	10	3	9	6	10	9
Guest house		4	7	4	4	4	5	5
Touring caravan/motorhome		1	4	8	3	4	4	4
Tent		2	4	3	3	5	3	4
Time share		1	7	1	2	-	3	2
Holiday/static caravan- rented		1	1	2	2	4	1	2
Youth hostel		5	2	1	1	1	2	2
Total:		100	100	100	100	100	100	100
<i>Base:</i>		<i>185</i>	<i>202</i>	<i>192</i>	<i>174</i>	<i>245</i>	<i>753</i>	<i>998</i>

- - nil respondents

Highlighting the importance of the VFR (visiting friends and relatives) market to Grampian, around one in three respondents spending at least one night away from home in Grampian were staying in the homes' of friends or relatives (34%).

Serviced accommodation was also important to visitors to the area almost a quarter of respondents staying in hotels (23%) and a slightly lower proportion staying in guest houses or bed and breakfasts (21%).

There were significant differences in the type of accommodation used by origin of visitors:

Scottish visitors: More likely to stay in hotels (31%) but less likely to stay in bed and breakfasts (8%).

Rest of UK visitors: More likely to stay with friends and relatives (43%) and in self-catering accommodation (15%). On the other hand they were less likely to stay in bed and breakfasts (9%).

Overseas visitors: More likely to stay in guest houses or bed and breakfasts (43%) but less likely to stay with friends and relatives (25%) and in self-catering accommodation (5%).

The majority of business visitors were staying in a hotel (76%).

Previous Visits

Just over a third of Grampian's non-resident visitors were on their first ever visit to the area (37%). Visitors to Moray and South Aberdeenshire were more likely to be on a first time visit (39% and 41%) while visitors to the City of Aberdeen were significantly less likely to be on a first time visit (30%).

Around one in five business visitors were on their first ever visit to the area (21%).

Transport Used to Get to Grampian

The private car was the most common means used by visitors to get to Grampian: around three in every five visitors travelled to the area by this means (61%). The comparative figure for Scotland was 63% amongst British tourists. A further 15% of visitors to Grampian travelled by plane and 11% by hire car.

Visitors to the City of Aberdeen were considerably more likely to travel by plane, train or public bus (35%, 15% and 11% respectively). These findings reflect the wide range of transport links available in this particular area.

Not surprisingly, overseas visitors were considerably more likely to travel to the area by hire car (32%) and plane (30%).

Transport Used in Grampian

In terms of transport used whilst in the area, again the private car dominated, used by almost three-quarters of respondents (72%). Visitors to the City of Aberdeen were again less likely to travel by private car and instead travel around by foot (20%), public bus (19%), or hire car (13%).

Motivations and Influences

Main Reasons for Visiting Grampian

All respondents were asked what attracted them to visit the Grampian area.

Table 4- Main reasons for visiting Grampian (%)

Base: All respondents (N=1,455)

	City	South	North	Central	Moray	Grampian LEC	Total Staying	Total
Visiting friends/relatives	35	19	27	19	18	25	27	23
Came for a specific event/attraction	16	7	12	16	7	13	7	11
The castles	1	22	11	12	9	12	12	11
Used to live here/wanted to come back/been before/regular visitor	10	11	13	8	11	10	12	11
Recommended/never been before/wanted to see it	12	11	12	12	8	12	12	10
Lovely scenery/countryside	4	20	8	6	11	10	11	10
Like the area/coast	2	10	9	5	9	6	8	7
Leisure activities e.g. golf, fishing	2	10	3	12	5	7	6	6
Whisky/distilleries	1	6	2	2	15	3	7	6
Touring/seeing as much as possible	6	5	5	7	5	6	6	5
Shopping	10	2	*	2	3	4	2	4
Total:	100	100	100	100	100	100	100	100
<i>Base:</i>	263	261	234	265	432	1,023	1,201	1,455

* - Less than 0.5%

Highlighting the importance of the VFR market to Grampian, almost a quarter of visitors to Grampian said this was their main reason for visiting the area (23%). This was by far the main reason for visiting the area. Nevertheless, Grampian clearly offers a number of attractions to visitors and this is highlighted by the fact that around one in ten visitors indicated they came to the area for a specific event or attraction (11%) and the same proportion stating that they were attracted by the castles (11%). Leisure activities and whisky distilleries were also relatively important, each mentioned by 6% of respondents. It should be noted that the methodology used in this survey and the choice of interview

locations would have under-represented the proportion of visitors in the area participating in formal activities such as playing golf, hill-walking and other similar pursuits.

The fact that visitors had been to the area before, whether on a previous visit or that they used to live in the area was also a significant attraction (11%). Conversely, for those who had never been to the area before this in itself was an important reason for visiting (10%). The scenic qualities of the area were also highlighted by the mention of the beautiful countryside and coast - 10% and 7% respectively.

There were significant differences in the motivations to visit Grampian by the sub-areas:

- *City of Aberdeen:* Visiting friends and relatives was most important amongst visitors to the City of Aberdeen (35%). Other important reasons include coming for a specific event or attraction (16%) and shopping (10%).
- *Aberdeenshire South:* The castles (22%), lovely scenery and countryside (20%), the mountains and hills (9%) and the peace and quiet (8%) were the main attractions of this area.
- *Aberdeenshire North:* Visiting friends and relatives was by far the main reason for visiting this area (27%).
- *Aberdeenshire Central:* Specific events and attractions were more important for visitors to this area (16%) as were leisure activities (12%) and visiting National Trust properties (6%).
- *Moray:* Whisky and distilleries were considerably more of an attraction amongst visitors to this area (15%) as were the wildlife and nature reserves (8%).

Main Requirements of a Holiday Destination

Still on the subject of motivations for visiting Grampian, those respondents on holiday, including those visiting friends and relatives on holiday were asked what their requirements were in choosing this type of holiday.

Table 5 - Main Requirements for Choosing Grampian for a Holiday (%)
Base: All respondents on holiday (N=1,146)

	City	South	North	Central	Moray	Grampian LEC	Total
Visiting friends/relatives	34	17	24	19	10	23	19
Scenery/countryside	10	28	12	13	22	16	18
Sightseeing	7	5	23	30	13	16	15
Castles/museums	11	15	17	16	12	15	14
Good place to relax/unwind	9	10	12	14	12	11	12
Lots of interesting places to visit	9	12	8	15	10	11	11
Peace & quiet	2	16	9	6	14	9	10
Historic places/the history	9	12	6	8	8	9	9
Leisure facilities e.g. golf, fishing	4	9	5	14	7	8	8
Just wanted to look around/touring	9	4	2	8	7	6	6
Good for walking	2	10	3	5	9	5	6
Good accommodation (value for money)	4	11	4	4	6	6	6
Distilleries	5	3	2	4	6	3	4
Total:	100	100	100	100	100	100	100
<i>Base:</i>	<i>182</i>	<i>223</i>	<i>194</i>	<i>200</i>	<i>347</i>	<i>799</i>	<i>1,146</i>

Once again, the importance of the VFR market is highlighted by the fact that around one in five respondents mentioned they were visiting friends and relatives (19%). This time however the scenic qualities of Grampian were of more importance to those on holiday with just under one in five respondents mentioning the scenery and countryside (18%) and a further 15% indicating they were looking for good sightseeing opportunities.

Specific attractions and interesting places to visit were also important factors in choosing Grampian for a holiday (14% and 11% respectively). Also, the opportunity to relax and unwind and the peace and quiet of the area were important influences for choosing Grampian as a holiday destination (12% and 10% respectively).

Influences on the Decision to Visit

Highlighting the importance of repeat visits to the area, the largest proportion of visitors were influenced by a previous visit (47%). The importance of informal information sources was also emphasised by the fact that around three in ten respondents were influenced by advice from friends and relatives (29%).

The various formal information sources were considerably less important - 12% of visitors cited the influence of a tourist brochure and 11% referred to the role of a guide book. Amongst overseas visitors to the area, both tourist brochures and guide books had considerably more influence, mentioned by 21% and 32% respectively.

The Visit

Attractions Visited

Respondents were presented with a list of attractions in Grampian and asked to indicate which, if any they had already visited and which they intended to go to during their stay in the area.

The most popular attraction was Baxters of Speyside, with around one in six respondents claiming they had already or intended to visit the attraction (16%). The two other main attractions were Glenfiddich Distillery and walking around Aberdeen city centre, each visited by around one in seven respondents (14%). Although walking around Aberdeen is not a 'pure' visitor attraction it is clearly seen as an attraction in its own right, recording a relatively high number of visits.

Activities

One of the key question areas within the survey was to ascertain the importance of different types of activities amongst visitors to Grampian. Respondents were asked to indicate which activities they *spent most of their time doing* during their visit to the area.

Note: Whilst every effort was made to cover as many different types of interview site as possible within the survey methodology, this approach will always tend to slightly undercount a number of the more active and remote pursuits e.g. golf.

Table 6 - Activities undertaken in Grampian (%)

Base: All respondents (N=1,455)

	<i>Grampian LEC</i>	Total Staying	Total
Non-sporting activities:	93	95	94
General sightseeing/touring	66	75	68
Visiting historic tourist attractions	43	45	40
Rest and relaxation	34	37	34
Shopping	25	23	24
Visiting other tourist attractions	20	25	23
Visiting museums & art galleries	26	20	20
Visiting gardens	16	15	13
Sporting activities:	15	15	14
Attending events (s):	5	4	4
Total:	100	100	100
Base:	1,023	1,201	1,455

* - Less than 0.5%
- - nil respondents

Visitors to Grampian spent most of their time during their trip on 'passive' activities with the vast majority indicating they spent most time doing some form of non-sporting activity (94%).

The largest proportion (68%) undertook general sightseeing or touring whilst in Grampian although a similar proportion visited historic tourist attractions e.g. castles, heritage sites or other types of tourist attractions e.g. distilleries (63%).

Sporting (or active) pursuits were less prolific amongst visitors to the area with only one in seven visitors claiming to spend most of their time undertaking a sporting activity (14%). The main sporting activity was walking with 8% of respondents spending most time doing this activity. No other sporting activity was mentioned by 2% of respondents.

There were some interesting variations in the types of activities undertaken by the sub-areas:

- *City of Aberdeen:* Visitors to this area were rather more likely than average to go shopping (38%), visit museums and arts galleries (57%) and attend events (8%).
- *Aberdeenshire South:* More popular amongst visitors to this area were general sightseeing or touring (79%), visiting

historic tourist attractions (62%), visiting gardens (21%) and walking (15%).

- *Aberdeenshire North*: Rest and relaxation was significantly more popular than average amongst visitors to this area (44%).
- *Aberdeenshire Central*: Visiting historic tourist attractions (46%) and sporting activities (20%) were more popular.
- *Moray*: More likely to go general sightseeing or touring (72%) and visit other tourist attractions (29%).

Information Sources Used During Visit to Grampian

Just under a third of visitors indicated they had used a Tourist Information Centre during their visit (32%).

Likes and Dislikes

To aid understanding of visitors' perceptions of the 'tourism product' Grampian has to offer, respondents were asked, unprompted, to specify the two things they liked most about the area.

Table 7- Two things like most about Grampian (%)

Base: All respondents (N=1,455)

	Cit y	South	North	Centra l	Moray	Grampian LEC	Total Stayin g	Tota l
Lovely scenery	14	39	25	29	40	27	31	31
Friendly people	23	16	24	19	24	20	24	21
Peace and quiet	3	19	21	8	16	12	14	13
The countryside	10	11	13	14	15	12	13	13
The hills/mountains	8	18	3	16	9	12	11	11
Lots to do and see/attractions	11	5	8	12	6	9	7	8
Castles	5	13	8	10	5	9	8	8
Coastal area	5	7	18	4	6	8	8	8
Architecture/granite/old buildings	16	4	4	4	2	7	5	5
History	5	4	3	7	4	5	5	5
Fresh air/air quality	3	3	6	3	3	4	4	4
Open spaces	3	5	3	4	4	4	4	4
Lovely clean area	5	5	2	2	4	3	4	4
Not much traffic	2	4	3	5	3	4	4	4
Total:	100	100	100	100	100	100	100	100
Base:	263	261	234	265	432	1,023	1,201	1,455

* - Less than 0.5%

The scenery and natural environment were the most important aspects of Grampian which visitors liked with around three in ten visitors mentioning the scenery in general (31%) and a similar proportion mentioning specific aspects of the natural environment such as the countryside, coast or hills and mountains (32%). The friendly people and tranquillity of the area were also key strengths of the area (21% and 13% respectively).

Highlighting the different strengths and weaknesses of different areas within Grampian there were some interesting variations in the particular likes of visitors to the five-sub areas. For example visitors to the City of Aberdeen were more likely to mention the architecture of buildings (16%) and shopping (12%), while visitors to Aberdeenshire South were more likely to mention the lovely scenery (39%), the peace and quiet (19%), hills and mountains (18%) and the castles (13%).

Highlighting the positive attitude towards Grampian, over half of visitors interviewed claimed that they disliked nothing about the area (59%). This proportion was highest amongst visitors to Moray (70%), possibly indicating slightly higher levels of satisfaction and decreased to 48% amongst visitors to the City of Aberdeen.

Expectations

For around half of holiday visitors, their visit to Grampian surpassed expectations (50%). This proportion was slightly higher amongst those interviewed in Aberdeenshire Central and Moray (54% and 55% respectively) and lower amongst visitors to the City of Aberdeen (33%). Just under half of visitors indicated their visit was about the same as they expected (45%).

Recommendation of Grampian

Encouragingly, nearly all visitors claimed they would recommend Grampian to friends and relatives (96%) with the bias towards the more positive category of 'strongly recommend' (74%).

Likelihood to Visit Grampian in the Future

Emphasising the high levels of satisfaction with the area, nine in ten of non-residents indicated they would be likely to return to the area (90%) with the majority in the highest ranking category of 'very likely'.

Expenditure

Finally, visitors were asked to indicate how much they had spent on their trip to Grampian. Respondents were asked how much they had spent on various elements of their trip over the previous 24 hours on themselves and any other members of their party.

Table 8 - Expenditure per person day - all visitors

Base: All visitors (N=1,455)

	City	South	North	Central	Moray	Grampian LEC	Total
*Accommodation	£12.18	£22.46	£11.67	£15.96	£14.01	£15.71	£15.28
Food and drink	£10.38	£9.88	£9.14	£9.87	£8.63	£9.84	£9.48
Entertainment	£2.42	£2.36	£2.95	£4.73	£1.49	£3.13	£2.64
Shopping	£9.41	£10.54	£6.32	£5.41	£11.31	£7.96	£8.94
Transport	£4.47	£4.81	£5.97	£6.68	£4.73	£5.47	£5.25
Total:	£34.11	£45.27	£33.00	£36.64	£33.06	£37.38	£36.06
Base	263	261	234	265	432	1,023	1,455

* Based on those respondents spending 1 night in Grampian in commercial accommodation

Typically, visitors to Grampian, including day-trippers spent £36 per person per day (including accommodation). Accommodation accounted for the largest proportion of total expenditure (42%).

The comparative figure recorded for Scotland was 30% amongst British tourists.

The average spend per person per day for those respondents *spending at least one night away* from home is £41. Not surprisingly, the *average spend per person for those on a day trip* was considerably lower at £13.

Business visitors to Grampian spent an average of £93 per person per day.

Those market segments spending more than the overall average per day included; overseas visitors (£57), those on holiday (£47), those staying in hotels (£71), and first time visitors (£50)

SURVEY OF POTENTIAL VISITORS

Scots

In an attempt to measure the current level of visits to Grampian and assess the likelihood of future visits amongst Scots, a series of questions were included in System Three's monthly omnibus survey in May and August 1999. Around 1000 adults aged 16 or over were interviewed in-home in over 30 sampling points throughout Scotland. The key results from this survey were as follows:

- ◆ The main reasons cited for not visiting Grampian were the lack of appeal and interest in the area, a preference to go elsewhere in Scotland or the UK and the relative inaccessibility of the area.
- ◆ The main strengths of Grampian were seen to be the attractive countryside and coastline and things to do and see such as good walking opportunities, tourist trails and castles.
- ◆ The cold and wet weather was perceived to be the main weakness of the area

Non-Scots

In order to quantify the views of potential non-Scots visitors to Grampian and to gain an understanding of the issues which might be addressed to encourage the conversion of these potential visitors, research was also undertaken with this market. A total of 487 face-to-face interviews were undertaken with visitors to Scotland at a number of selected holiday destinations outwith Grampian.

Grampian was seen by many to have beautiful scenery with significant proportions of respondents associating the area with attractive countryside and coastline. The area was also perceived to have strong connections with history and culture, castles, whisky, walking opportunities and tourist trails.

Table -9- Levels of agreement with attitude statements(%)

Base: All respondents (N=487)

	Agree strongly	Agree	Neither	Disagree	Disagree strongly	Don't know
I don't know much about this area	32	53	5	7	1	2
This area is too far away from the main tourist route in Scotland	3	30	15	37	4	11
There's not much to see and do in this area	1	5	20	40	8	25
It would take too long to get to this area	4	32	14	34	6	9
I would like to visit this area, it just did not fit in with my plans for this holiday	9	59	11	15	2	4
It is not an area for holidays	1	6	17	48	10	17

There would appear to be considerable opportunity to raise awareness of the Grampian area amongst non-Scots visitors, with 85% of respondents agreeing with the statement "I don't know much about this area."

A significant minority of respondents felt that the area was difficult to get to with around 1 in 3 respondents stating that the area is some distance away from the main tourist routes and that it takes too long to get to the area - 33% and 36% respectively.

Although only a few per cent believed that there is not much to see and do in the area, around half of respondents neither agreed nor disagreed or were unable to answer the question (45%), suggesting there is considerable scope to educate potential visitors on the activities on offer in Grampian.

Encouragingly, over two-thirds of respondents would have liked to visit Grampian on this trip to Scotland but it did not fit in with their plans (68%).

Finally, with around a third of respondents undecided as to whether the Grampian area is suitable for holidays (34%), this

would again suggest there is an opportunity to increase promotion of the area as a holiday destination.

FOCUS GROUPS AND DEPTH INTERVIEWS WITH EXISTING AND POTENTIAL VISITORS

In order to obtain detailed information on the perceptions, images and opinions of both visitors and potential visitors to Grampian, a series of focus groups and depth interviews were undertaken to supplement the face-to-face surveys with both existing and potential visitors. Respondents were recruited on the basis of origin (Scots, rest of UK and overseas visitors) and lifecycle characteristics.

Perceptions

When asked what the word 'Grampian' meant to them, for most English and overseas respondents it meant very little. Although a reasonable number of Scots were aware it was an administrative area in Scotland, many had very low awareness levels about the location and content of the area.

The area's connection with royalty was recognised amongst nearly all visitors. Amongst those respondents who had visited the area or were currently visiting the area, the association with beautiful scenery was well-established.

The area was seen as a holiday destination for those individuals who like the outdoor life, with particular interests in activities such as walking, fishing and field sports. A significant proportion of Scottish respondents associated the area with whisky but this view was generally not shared by English and overseas respondents. Although many recognised the area had many castles, considerably fewer were of the view that Grampian had a variety of other visitor attractions.

For many respondents Grampian was associated with peace and tranquillity and therefore seen to be a destination for a relaxing holiday. It was generally viewed as a short break destination as opposed to a main holiday destination.

Experience

It was recognised by all types of visitors that a car was necessary to visit many of the towns and villages dispersed throughout the area. Although the majority of respondents commented they were satisfied with the level of provision of

things to do on the area, there was a view amongst some of the younger respondents that more organised outdoor activities could be made available.

Reasons for not visiting Grampian

For most respondents the lack of knowledge about the area and its tourism product were the main reasons for not visiting. There was a concern that, with the exception of Balmoral, the area had no 'must see' attractions or events.

Factors which might encourage a visit

The majority of respondents were of the view that increased promotion of the area was essential. There was also a view that development and promotion of improved transport links both within the area and to the area could encourage visitors to the area.

The availability of holiday packages to the area combining accommodation, food, transport, possibly care hire and some activities at an affordable price could also encourage respondents to visit the area. Younger respondents, in particular were of the opinion there was also a need to package and promote the activities available in the area at a reasonable price.

Amongst potential family visitors the development and promotion of facilities for children was also seen as of considerable importance to encourage visits to the area.