

2025 Annual Consumer Research

Headline findings

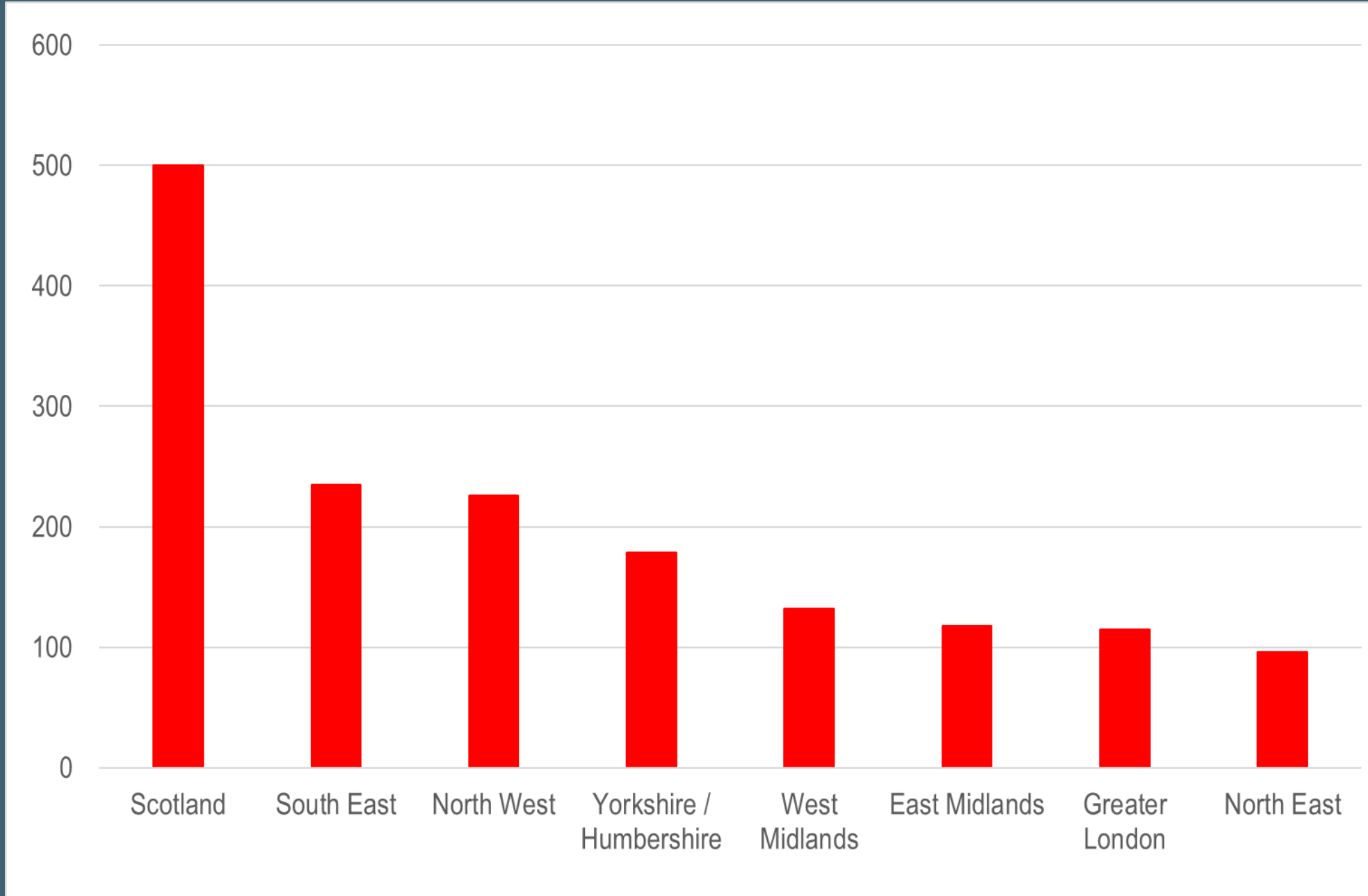
October 2025



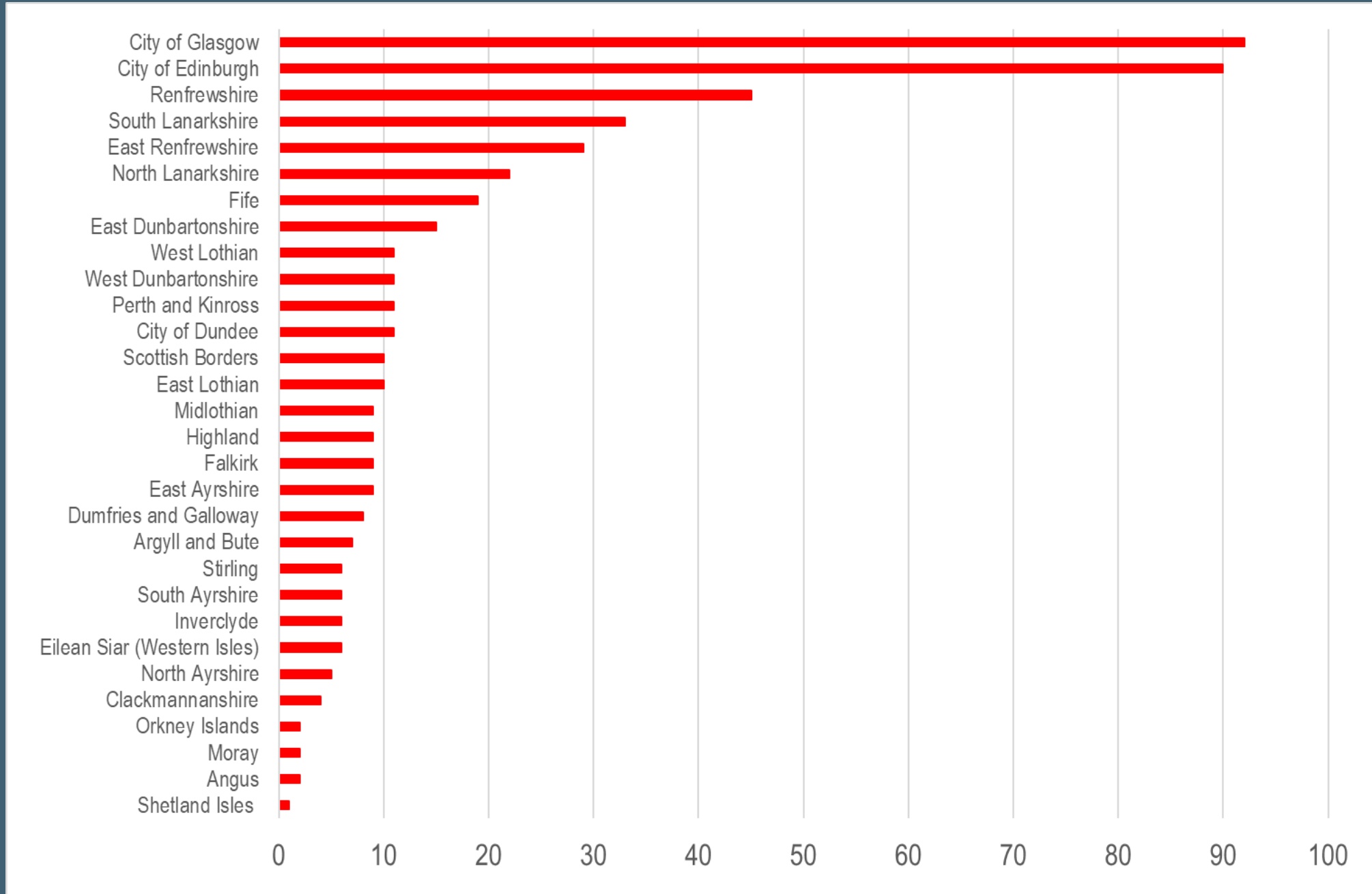
About the study

- This was the fourth wave of an annual survey enabling VisitAberdeenshire to better understand potential visitors and track progress against KPIs
- Fieldwork was conducted by TMK in September / October 2025
- 1,601 consumers completed the online survey all of whom were aged 18+, open to taking a domestic holiday or short-break in the next year and lived in Scotland (excluding Aberdeen/shire), North of England, Midlands, South East England or Greater London
- To limit survey length the sample was split to ensure respondents were quizzed about either City or Shire and one other urban or rural destination

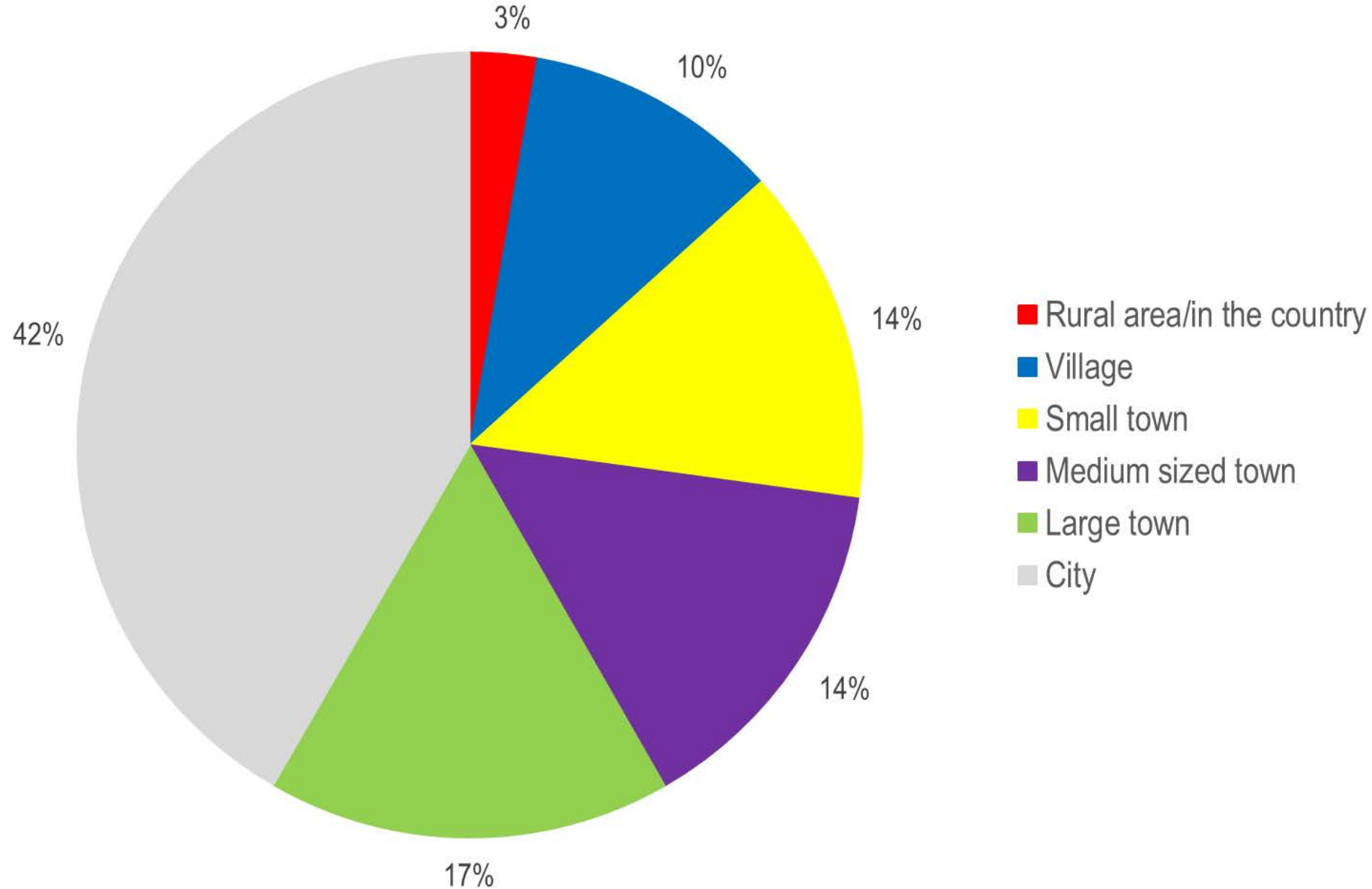
Respondent profile: where they live



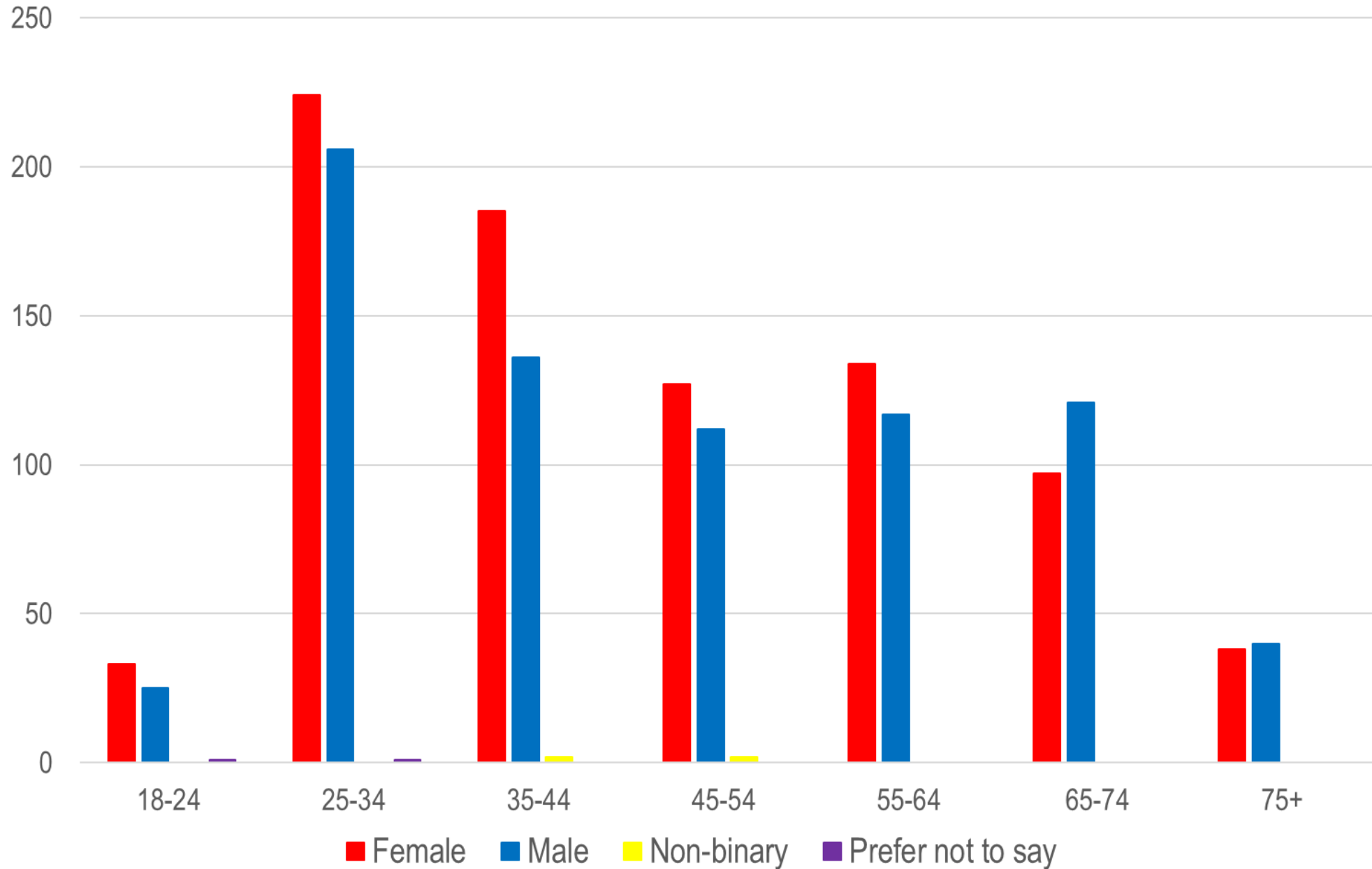
Respondent profile: where those from Scotland live



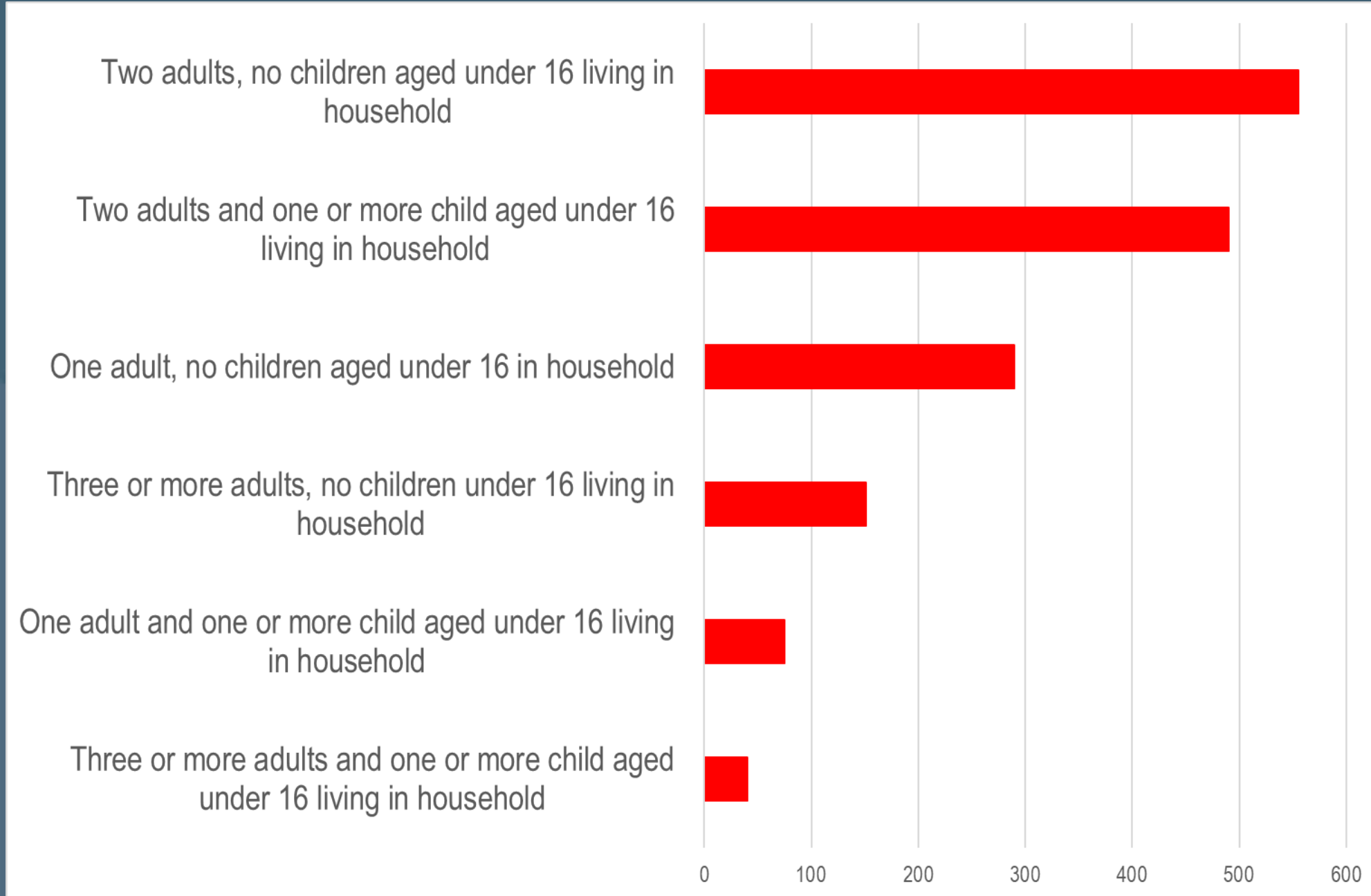
Respondent profile: type of place



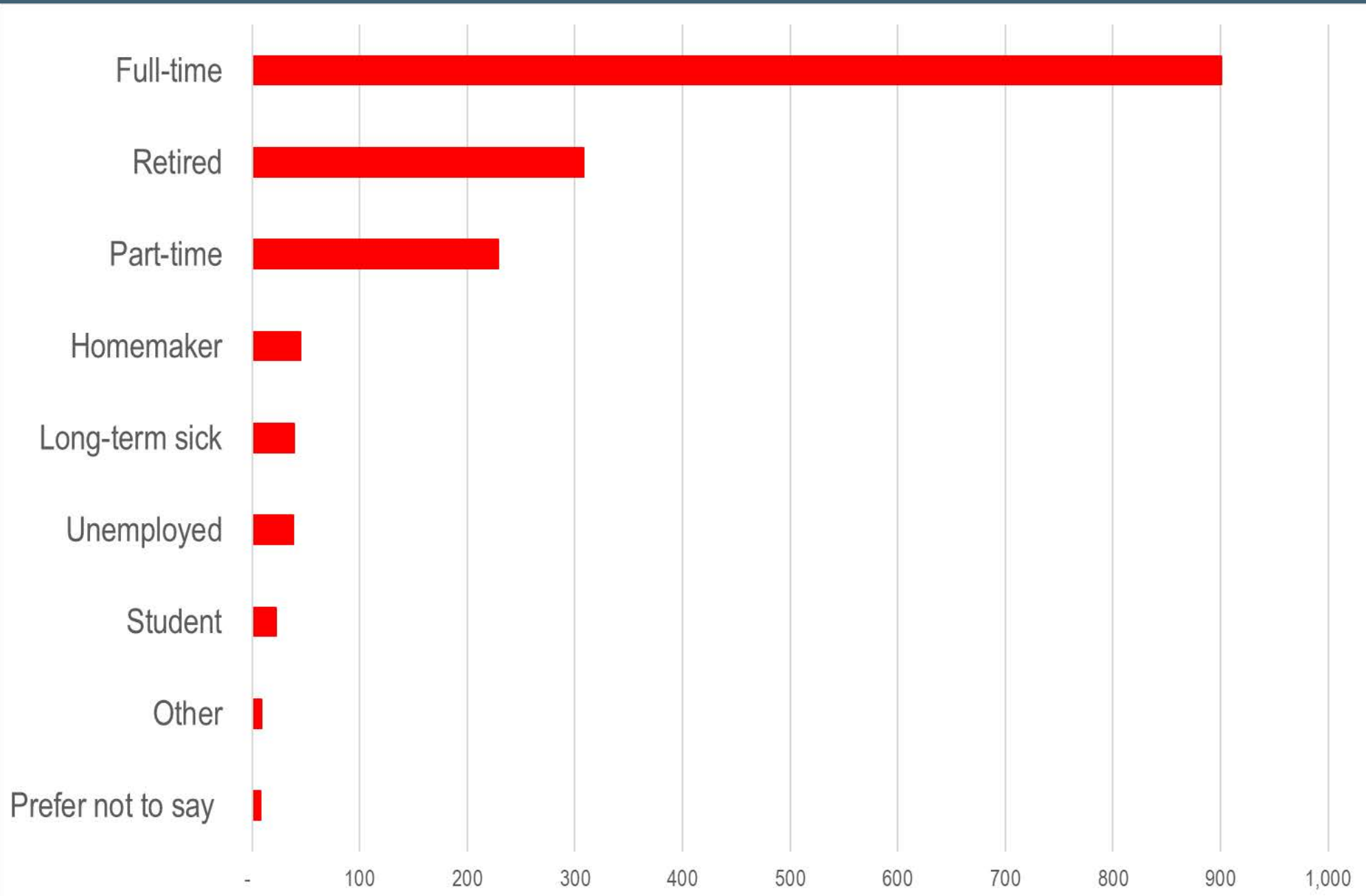
Respondent profile: demographics



Respondent profile: household composition

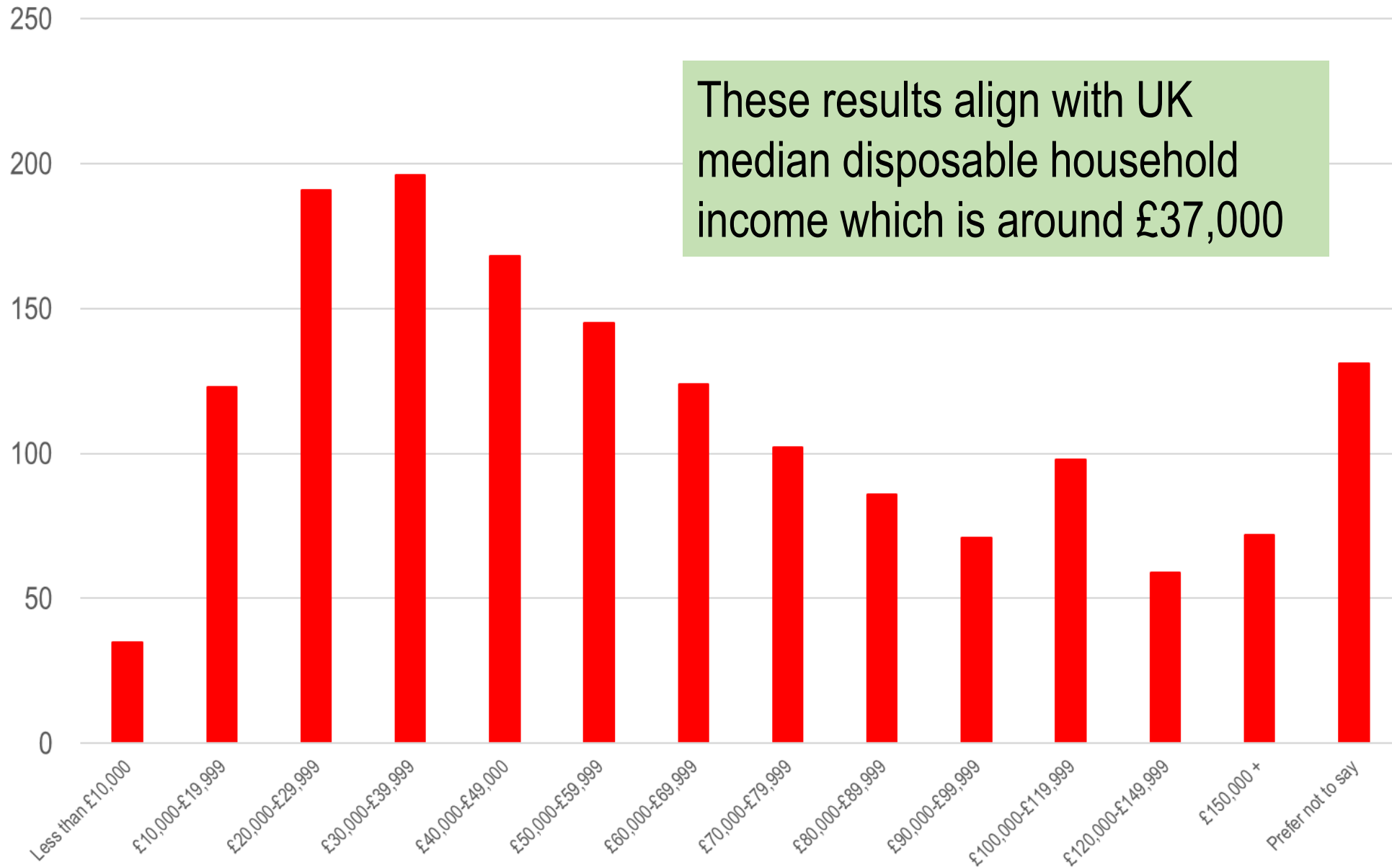


Respondent profile: working status

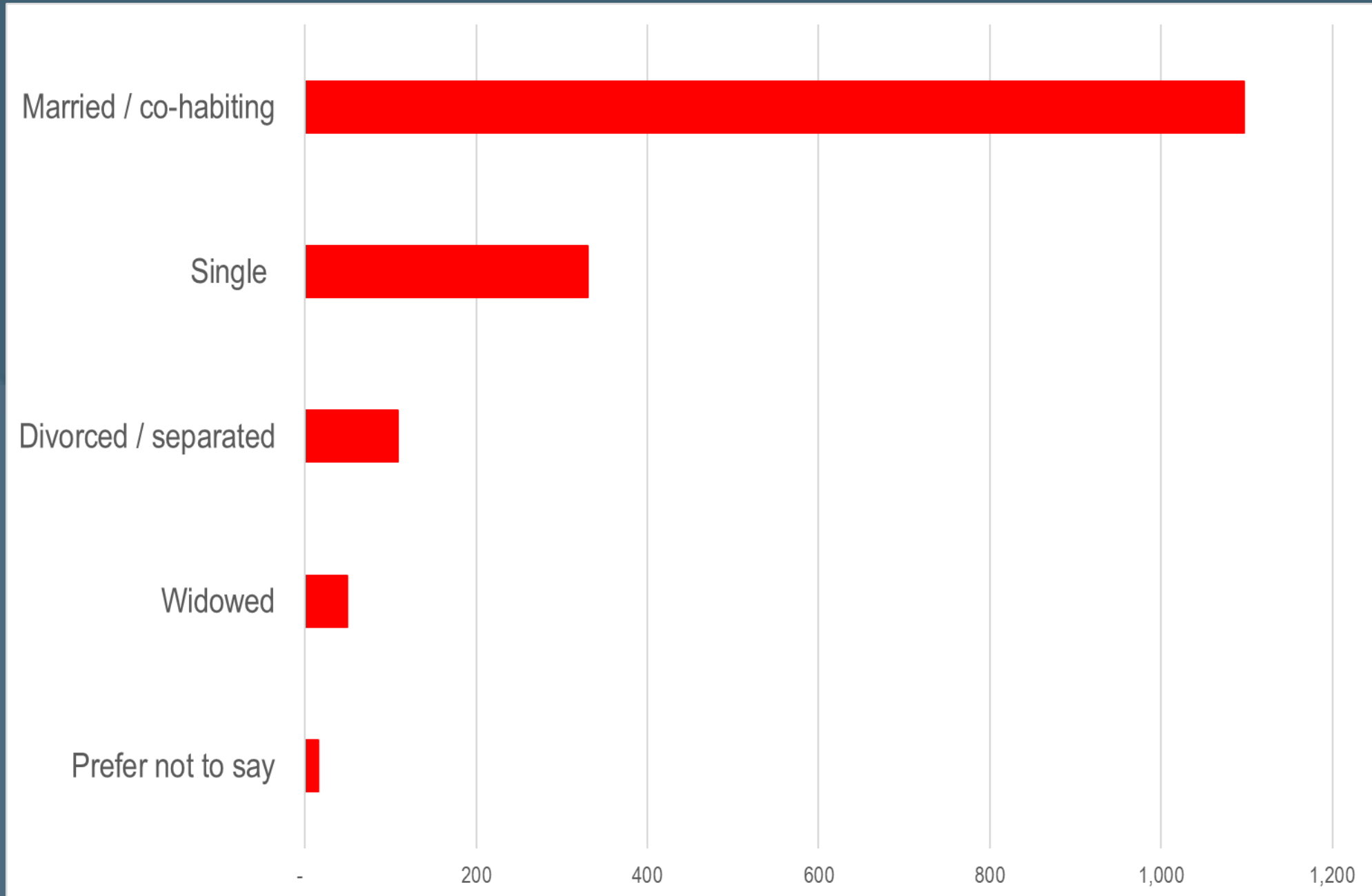


Respondent profile: annual household income

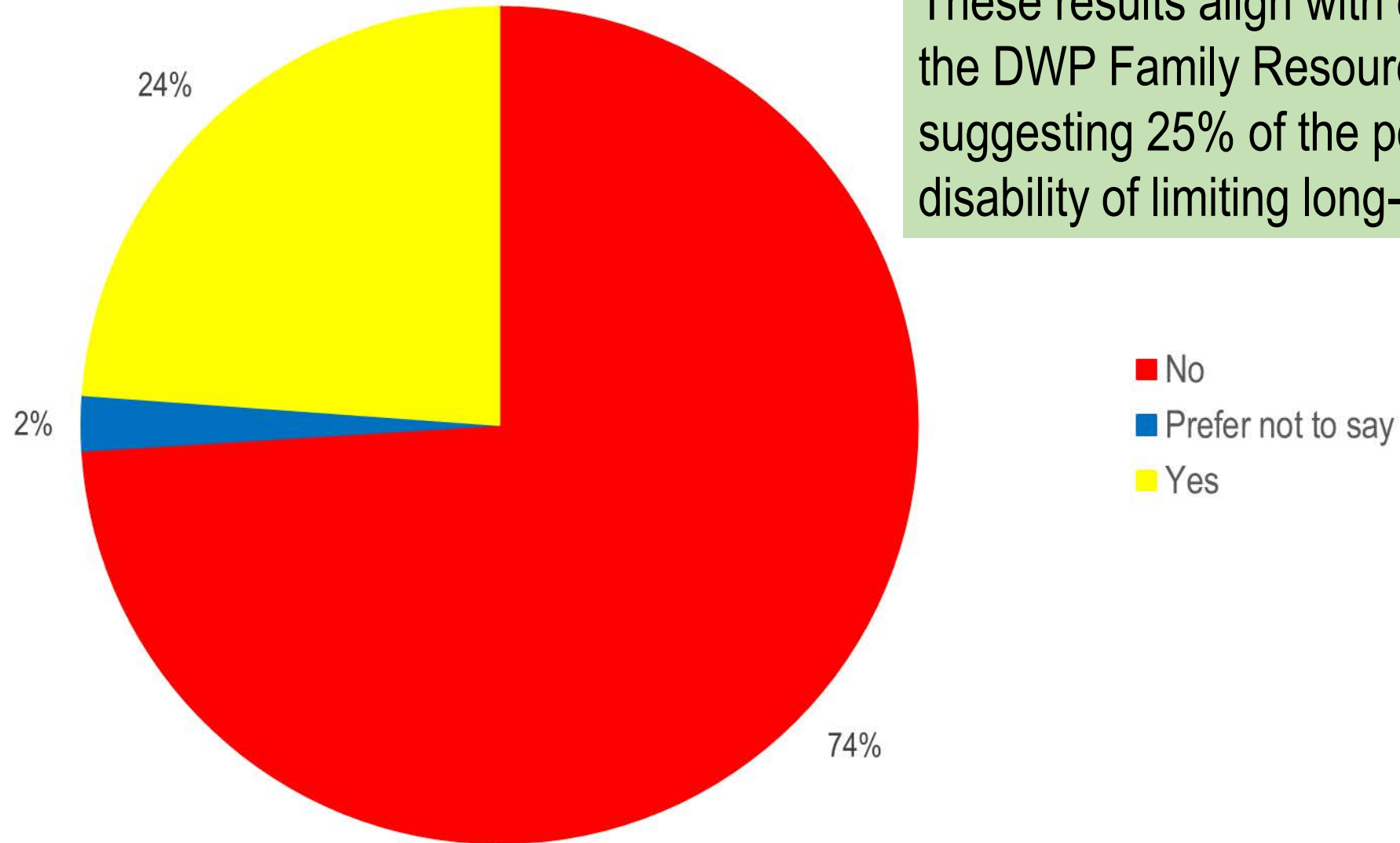
These results align with UK median disposable household income which is around £37,000



Respondent profile: marital status

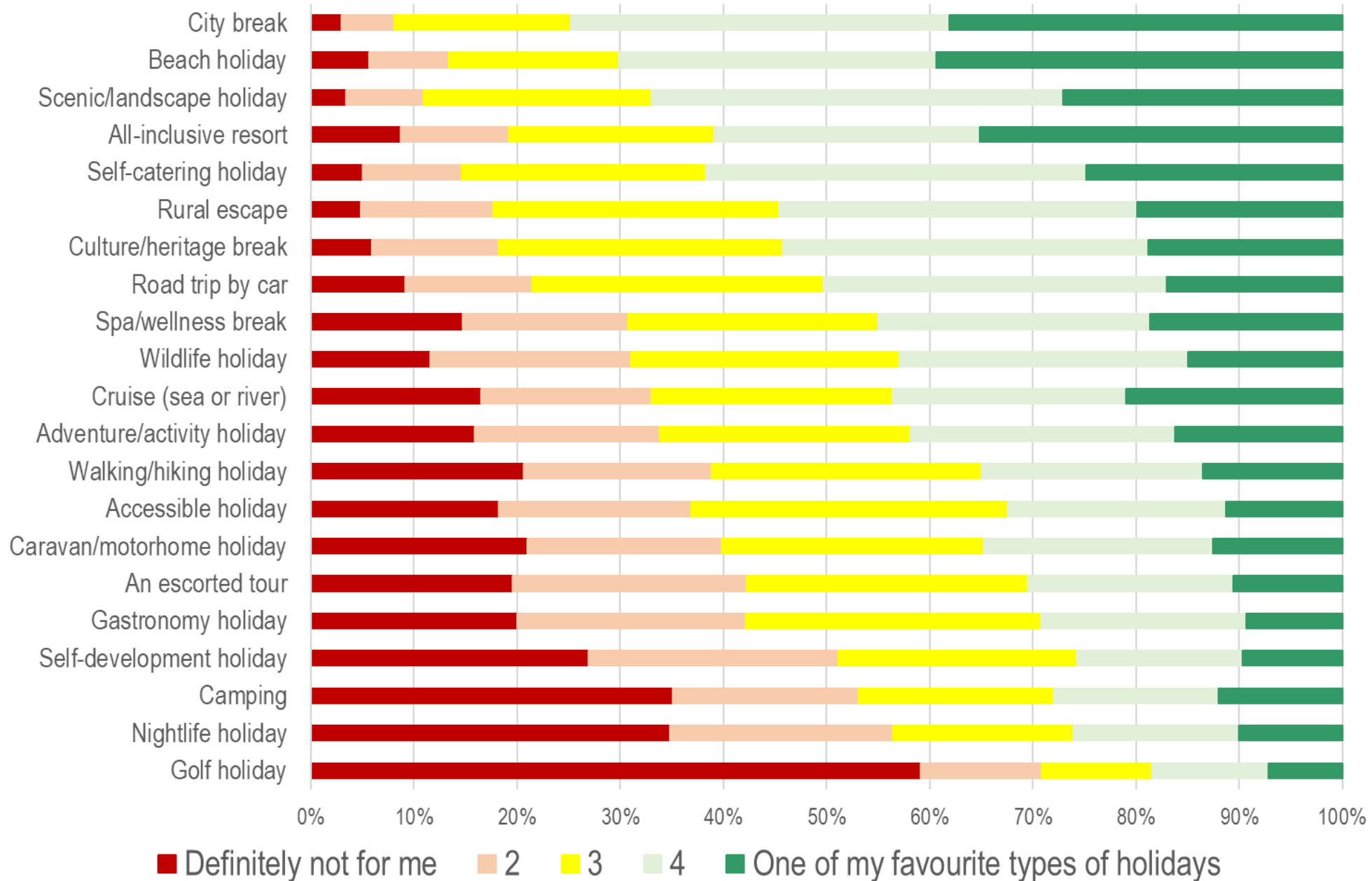


Respondent profile: disability (self or travel companion)

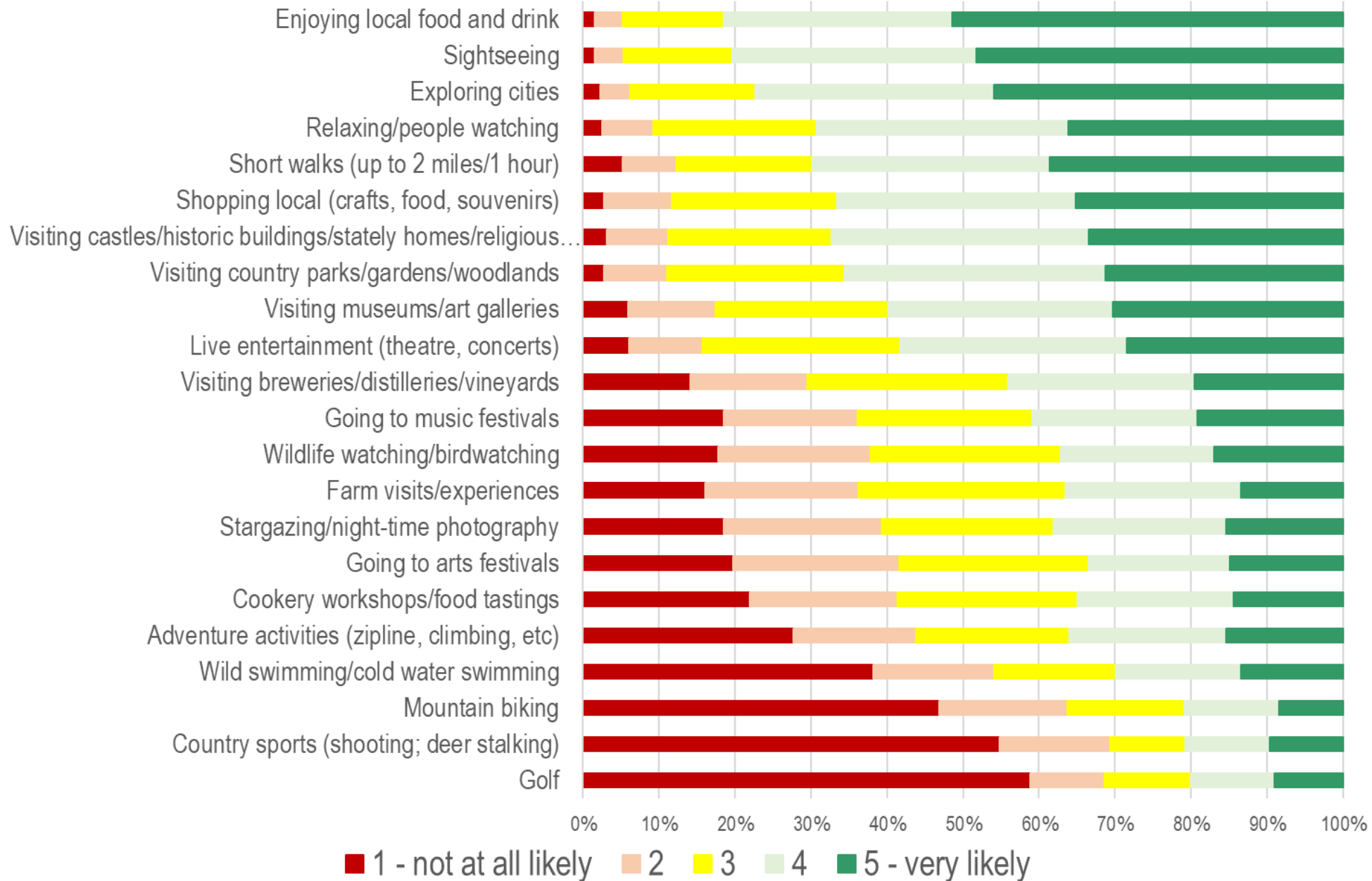


These results align with estimates from the DWP Family Resources Survey suggesting 25% of the population has a disability of limiting long-term illness

Holiday type preferences



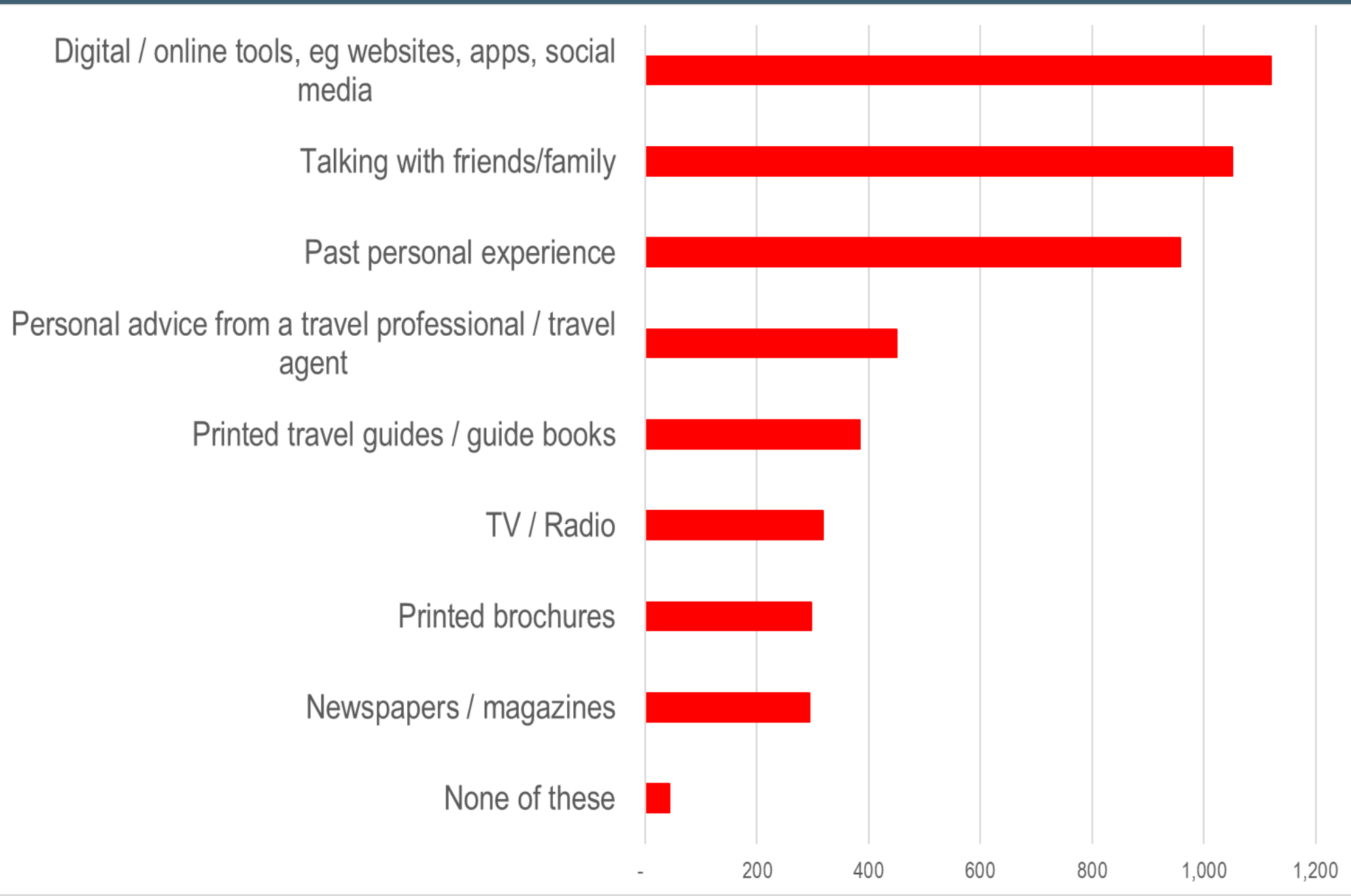
Activity preferences



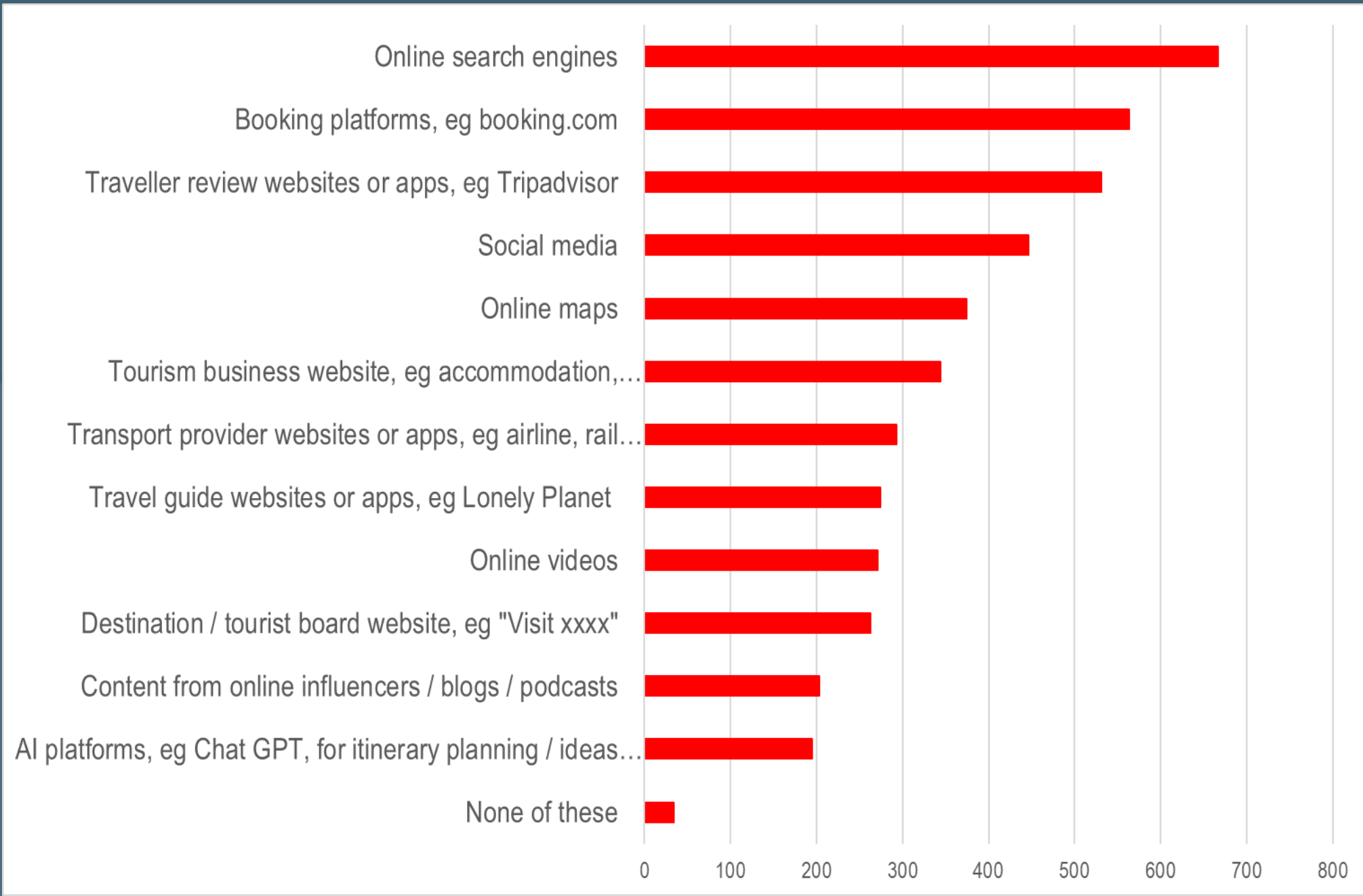
Scattergun
marketing works

Targeted
marketing
essential

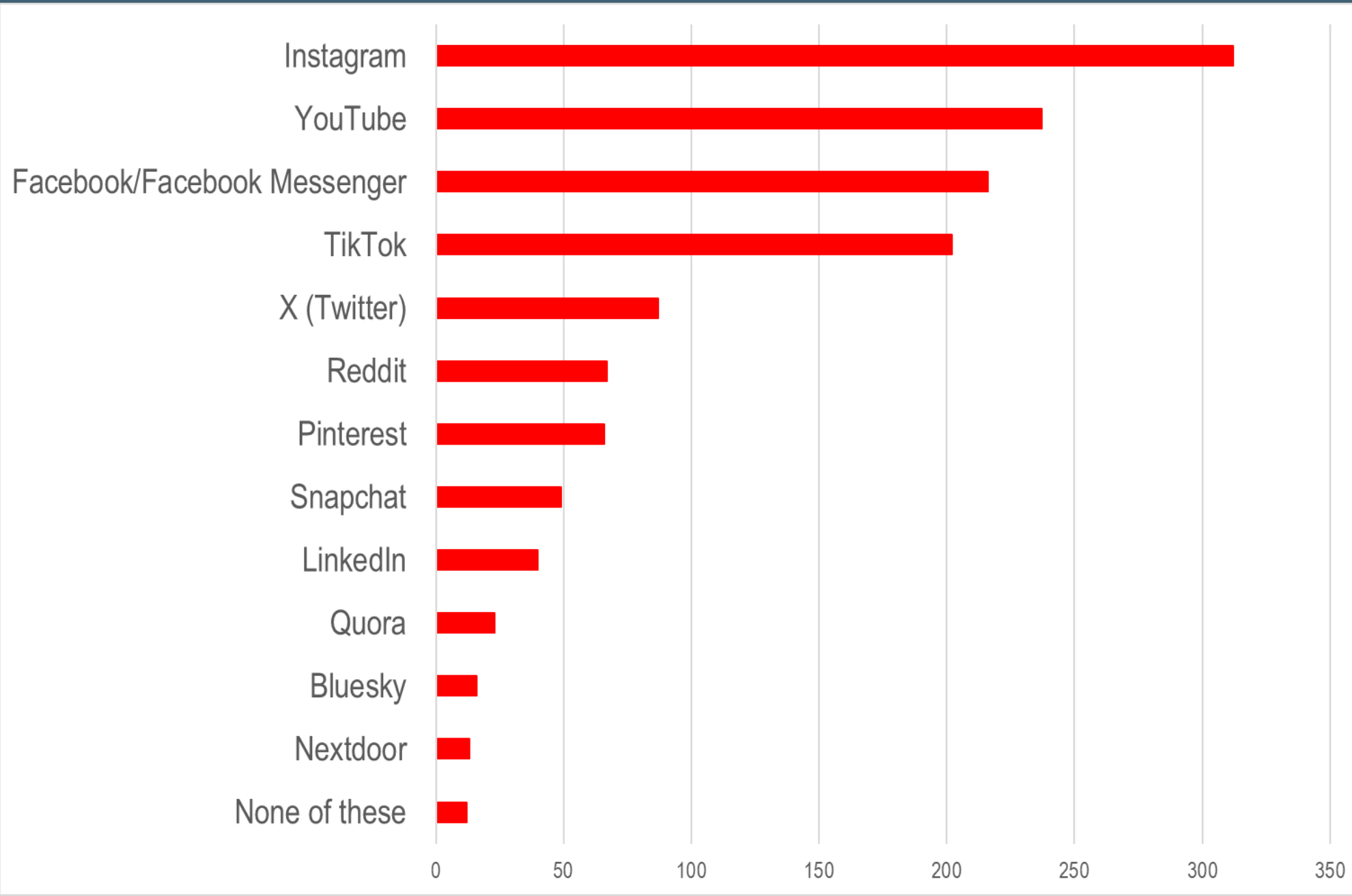
Types of information used to decide where to go



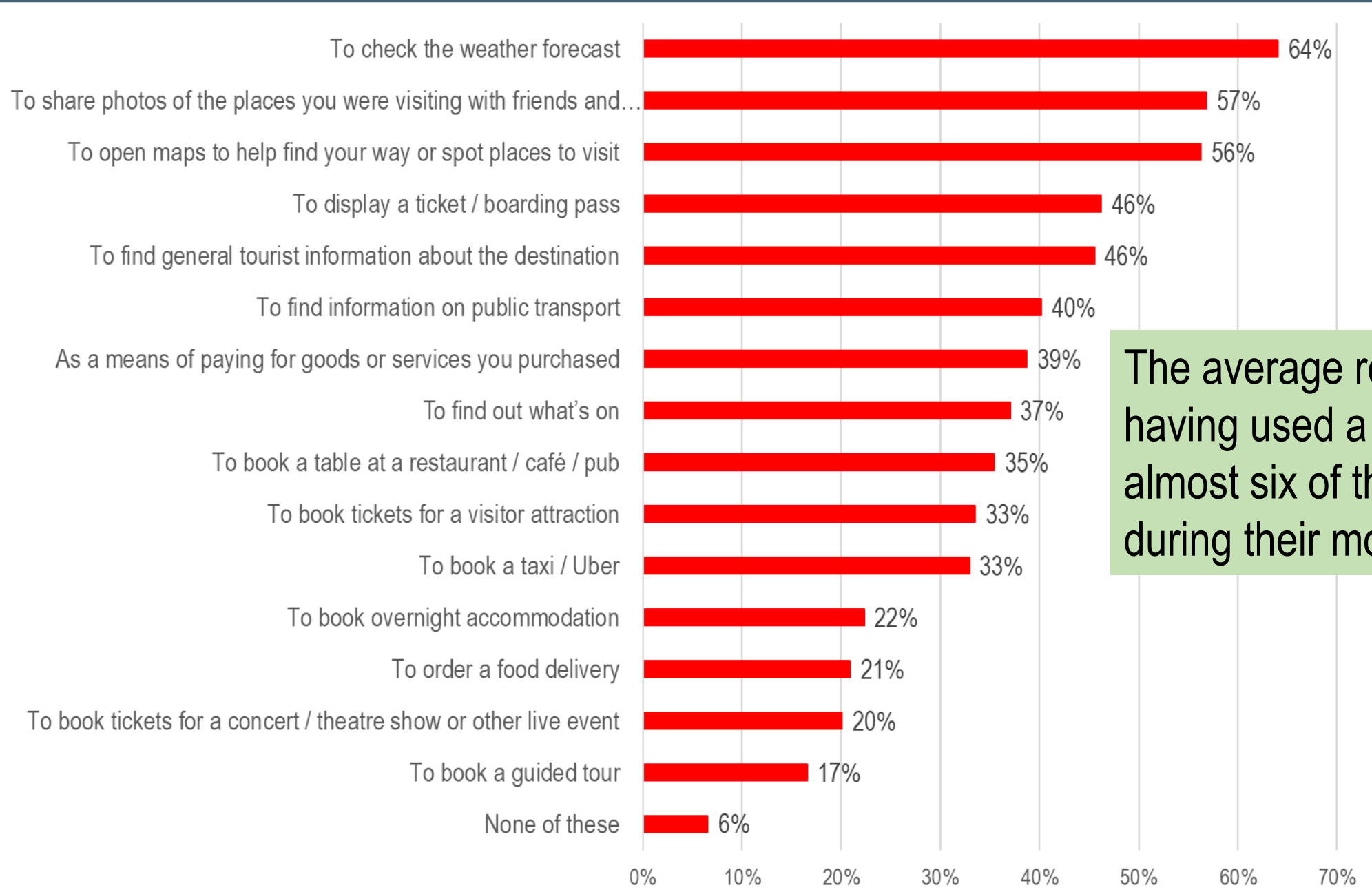
Online tools used in connection with most recent trip



Social media platforms used to help decide where to go

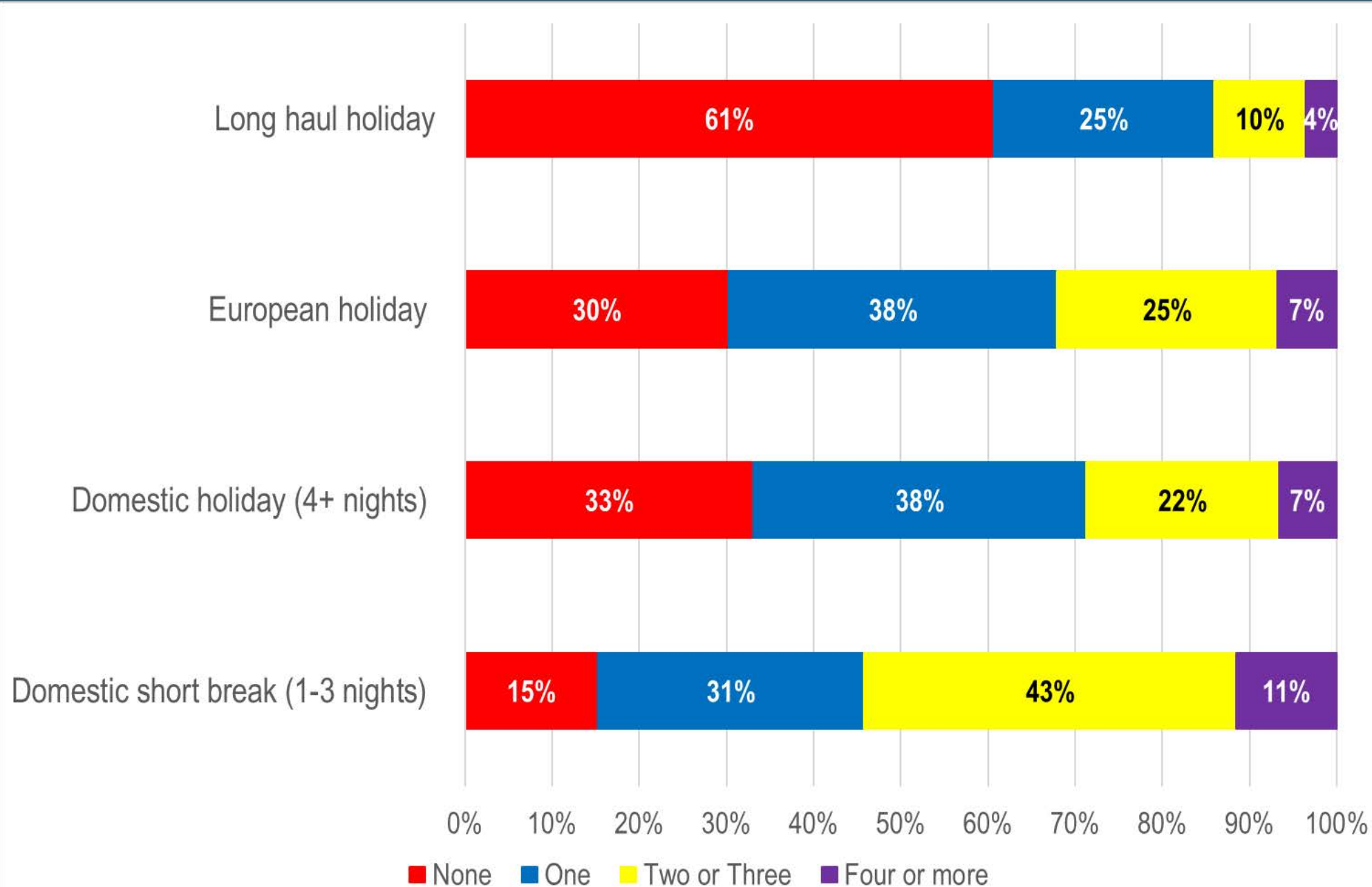


Ways in which smartphone used during most recent trip

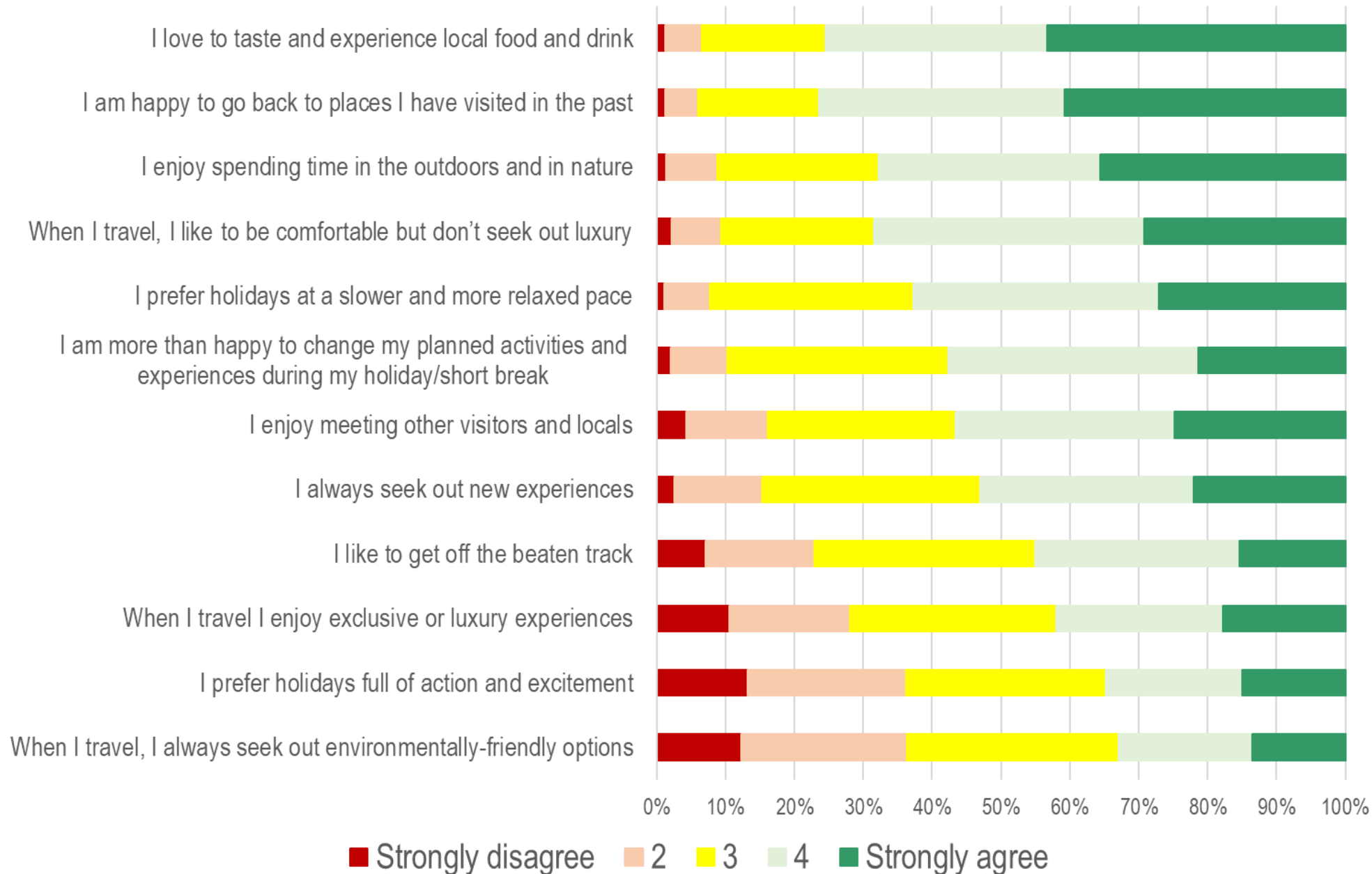


The average respondent reported having used a smartphone for almost six of these reasons during their most recent trip

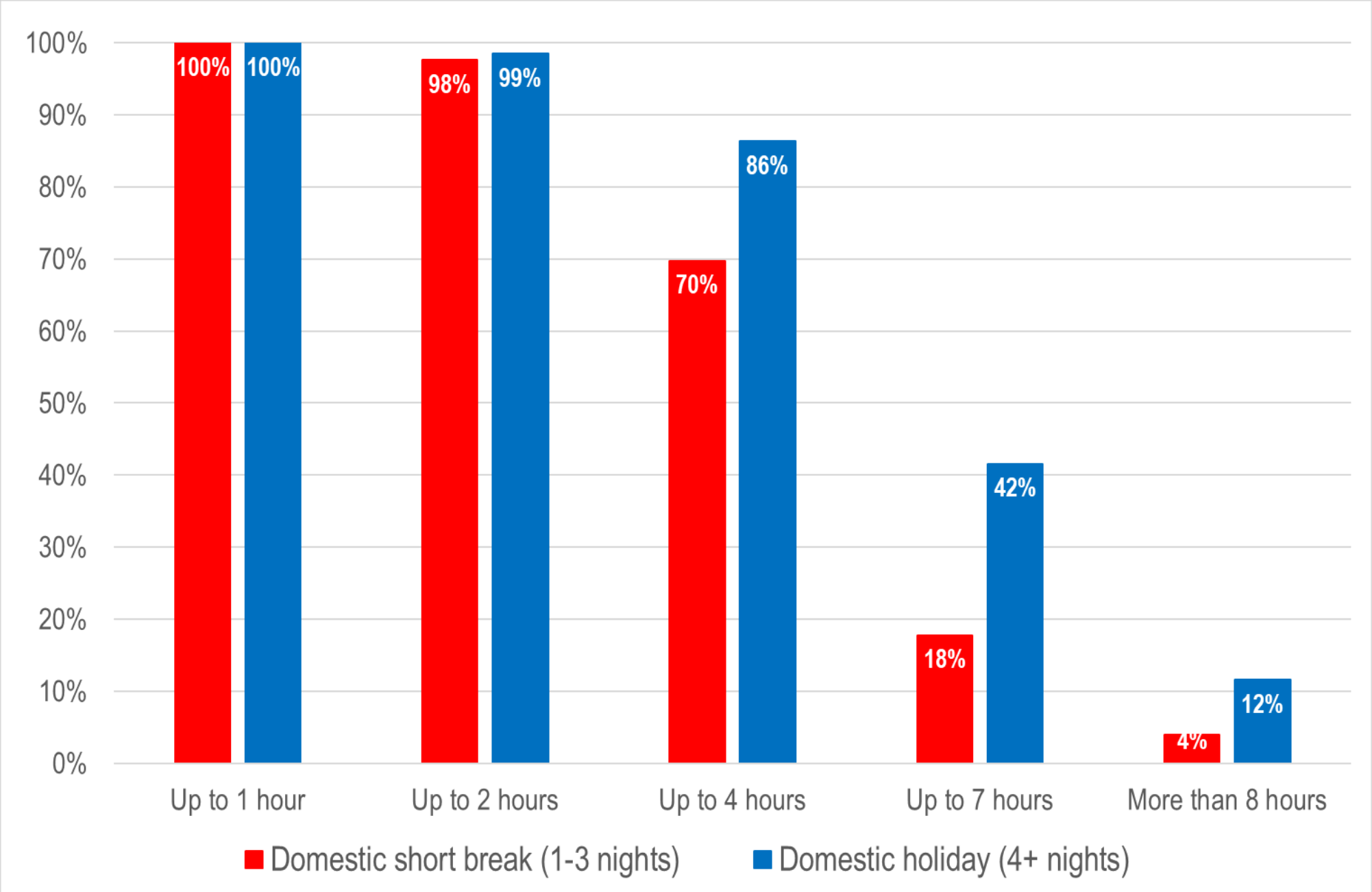
Number of holidays or short-breaks in past year



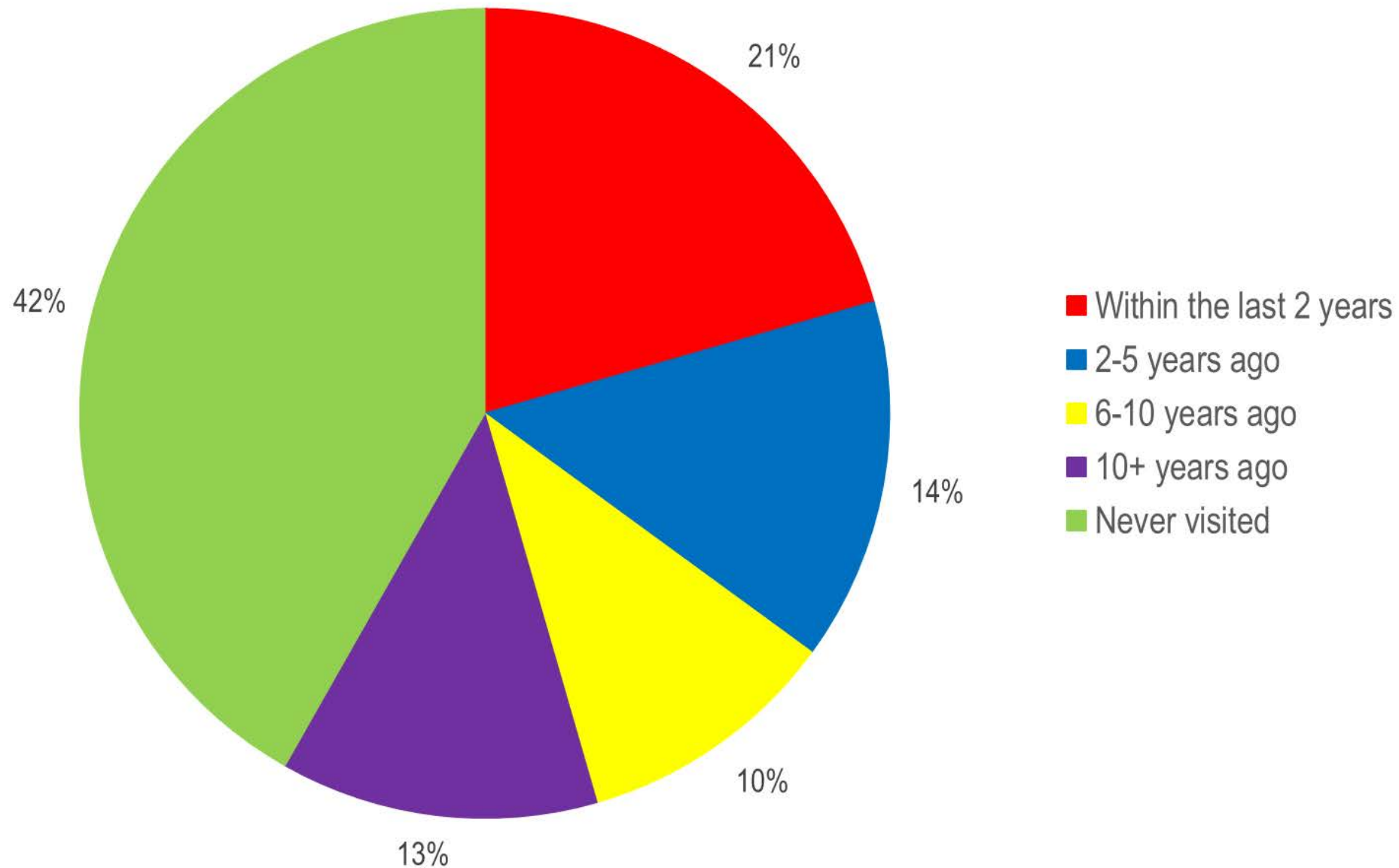
Agree/disagree statements



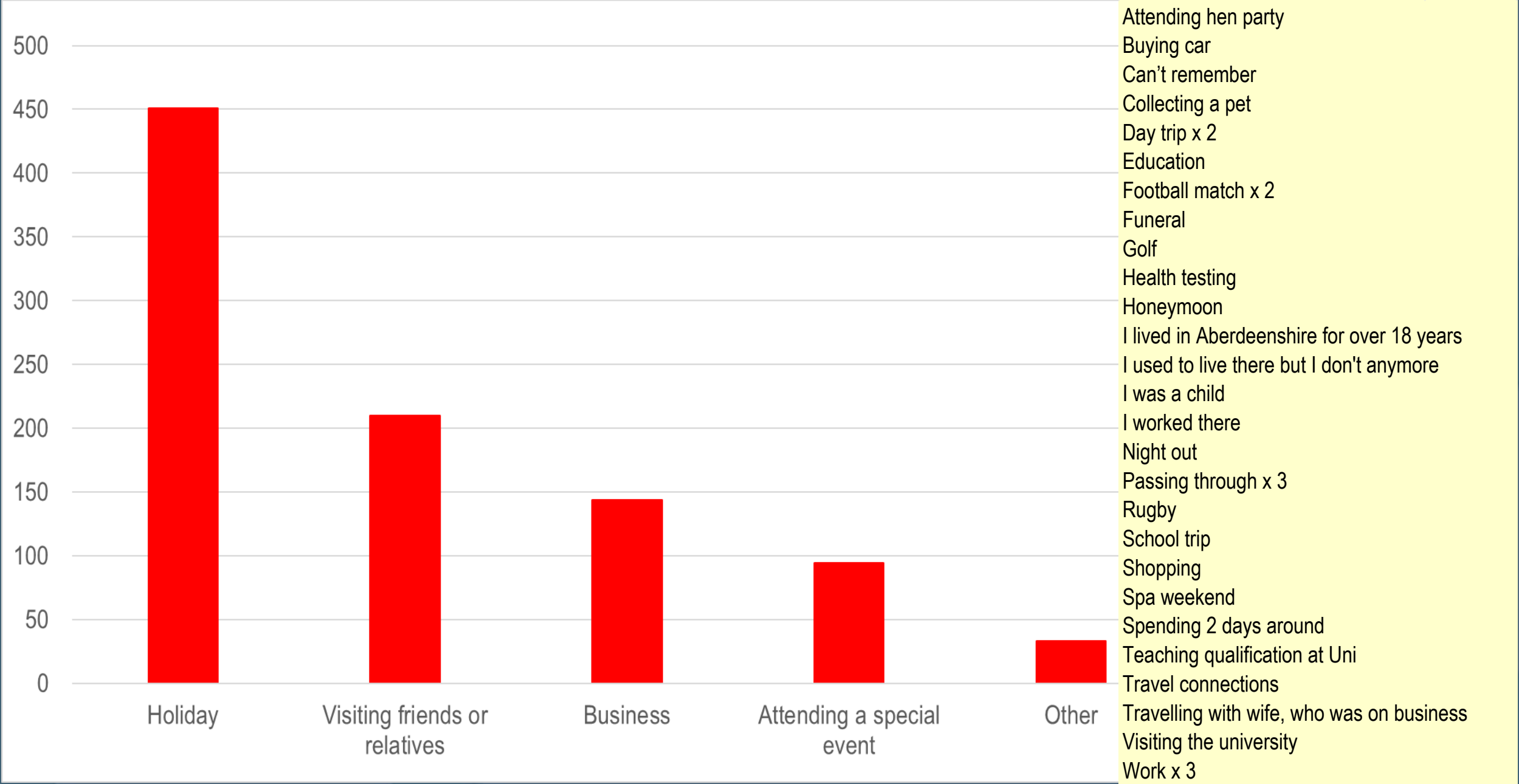
Journey time tolerances



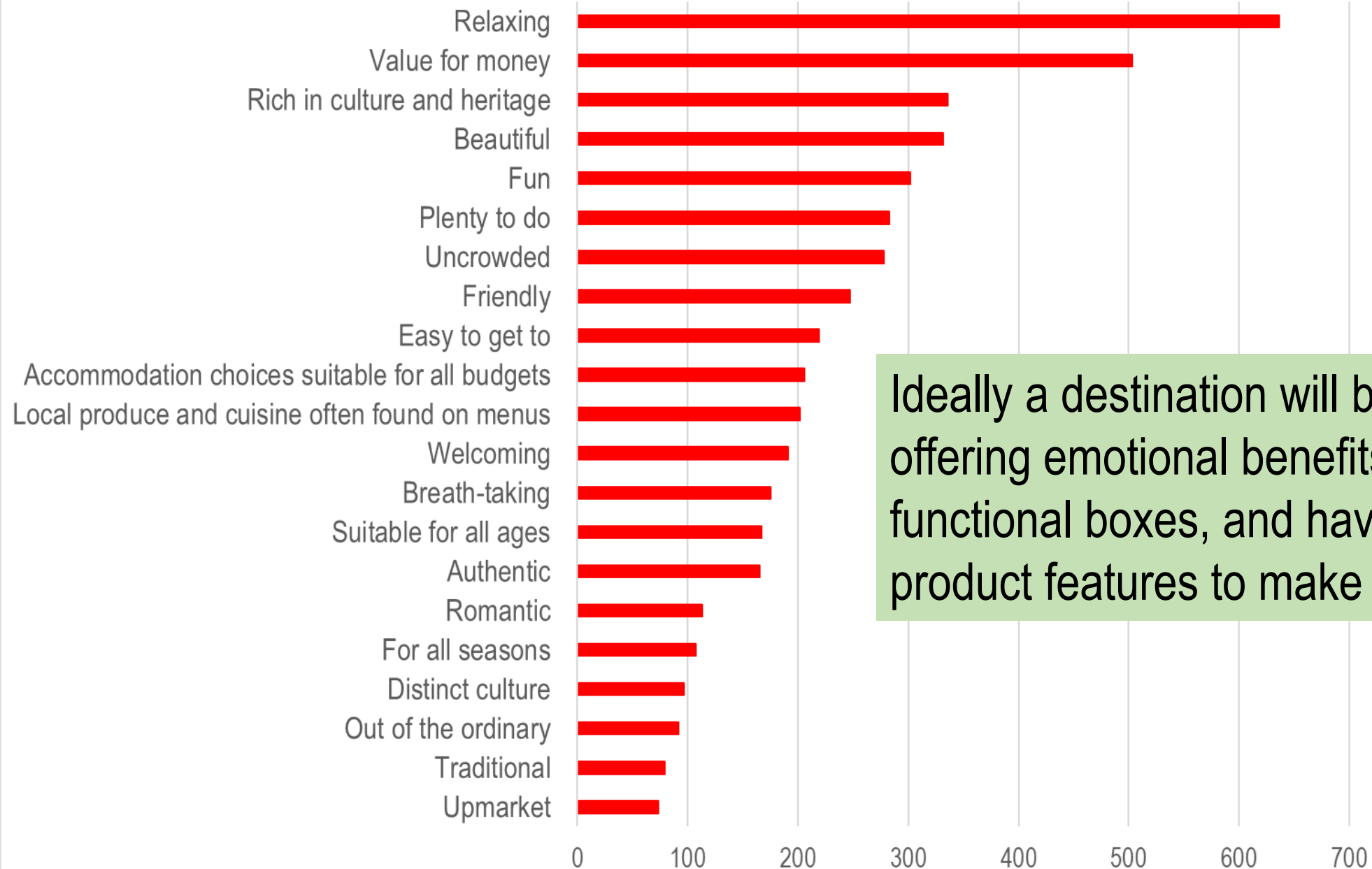
Previous visit to City or Shire



Purpose of last visit



“Ideal” holiday or short-break destination

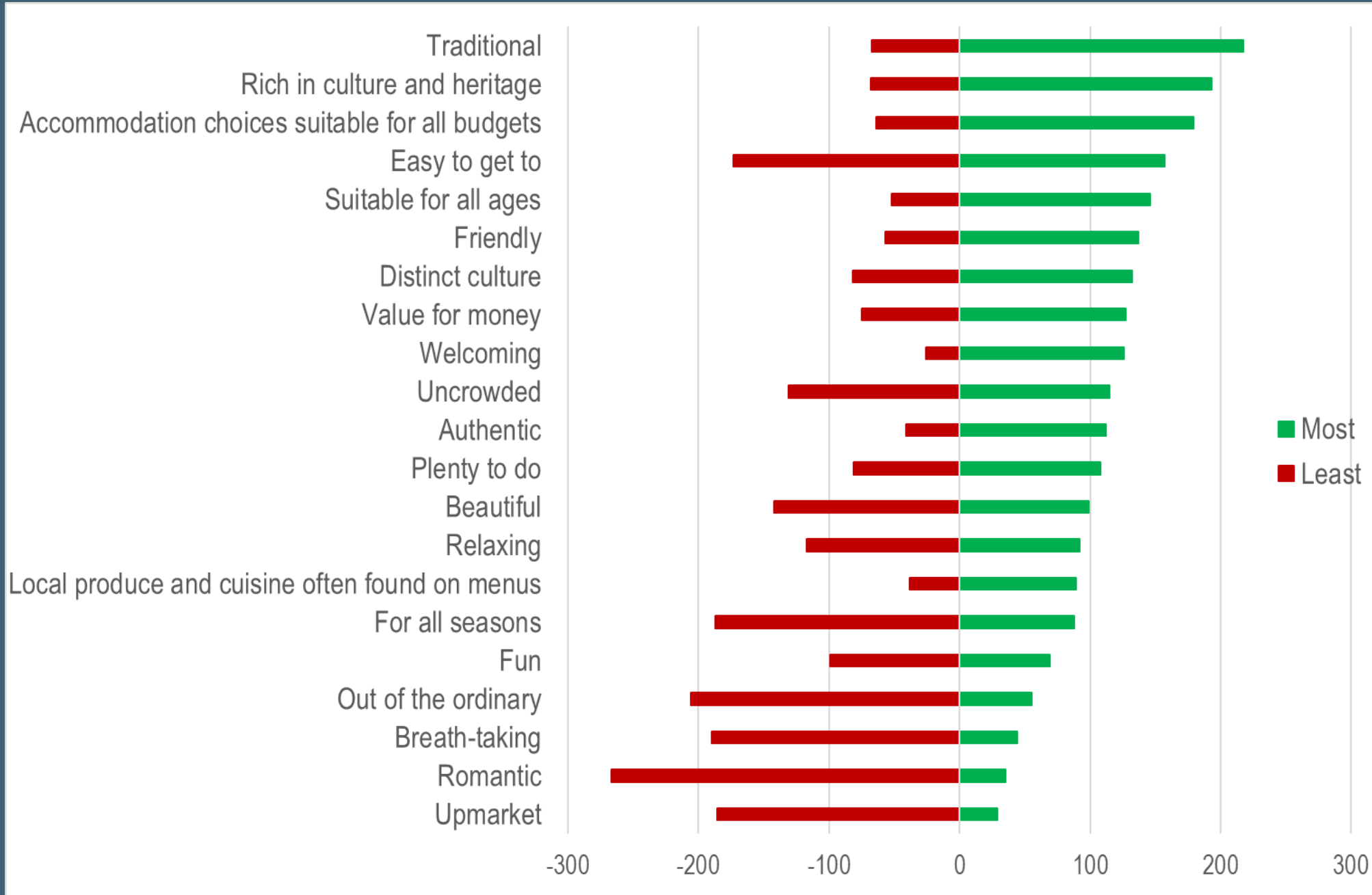


Ideally a destination will be seen as offering emotional benefits, tick the right functional boxes, and have sufficient product features to make a visit worthwhile

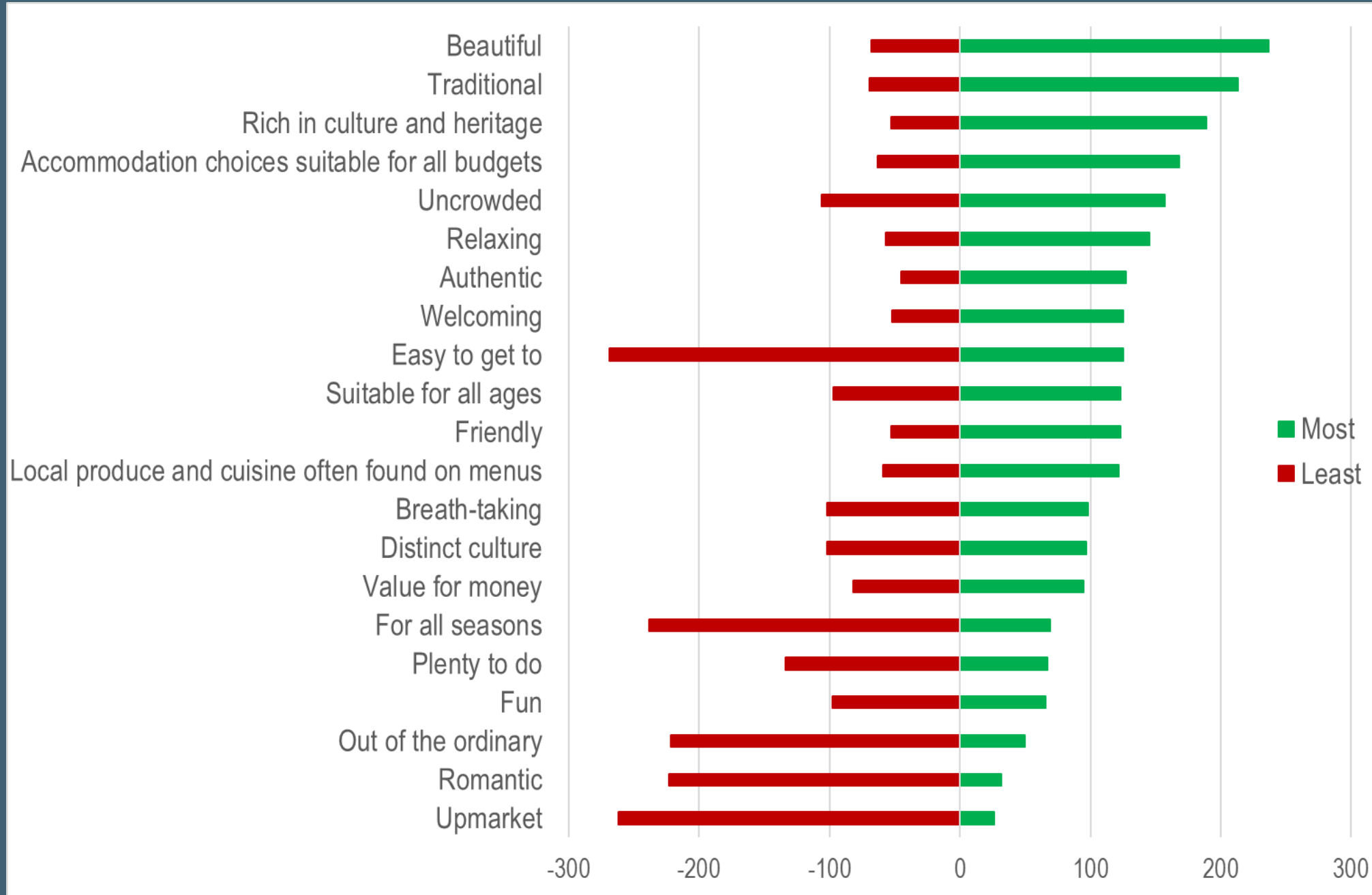
Most picked word/phrase by broad age cohort

	Under 35	35-54	55+	All
Relaxing	1	1	1	1
Value for money	2	2	2	2
Rich in culture and heritage	5	6	3	3
Beautiful	4	3	9	4
Fun	3	4	15	5
Plenty to do	6	5	8	6
Uncrowded	11	7	4	7
Friendly	6	9	6	8
Easy to get to	15	11	5	9
Accommodation choices suitable for all budgets	8	12	11	10
Local produce and cuisine often found on menus	16	10	7	11
Welcoming	14	14	10	12
Breath-taking	11	13	13	13
Suitable for all ages	9	8	20	14
Authentic	13	15	12	15
Romantic	10	17	21	16
For all seasons	17	20	14	17
Distinct culture	19	16	18	18
Out of the ordinary	18	19	19	19
Traditional	21	18	17	20
Upmarket	20	21	16	21

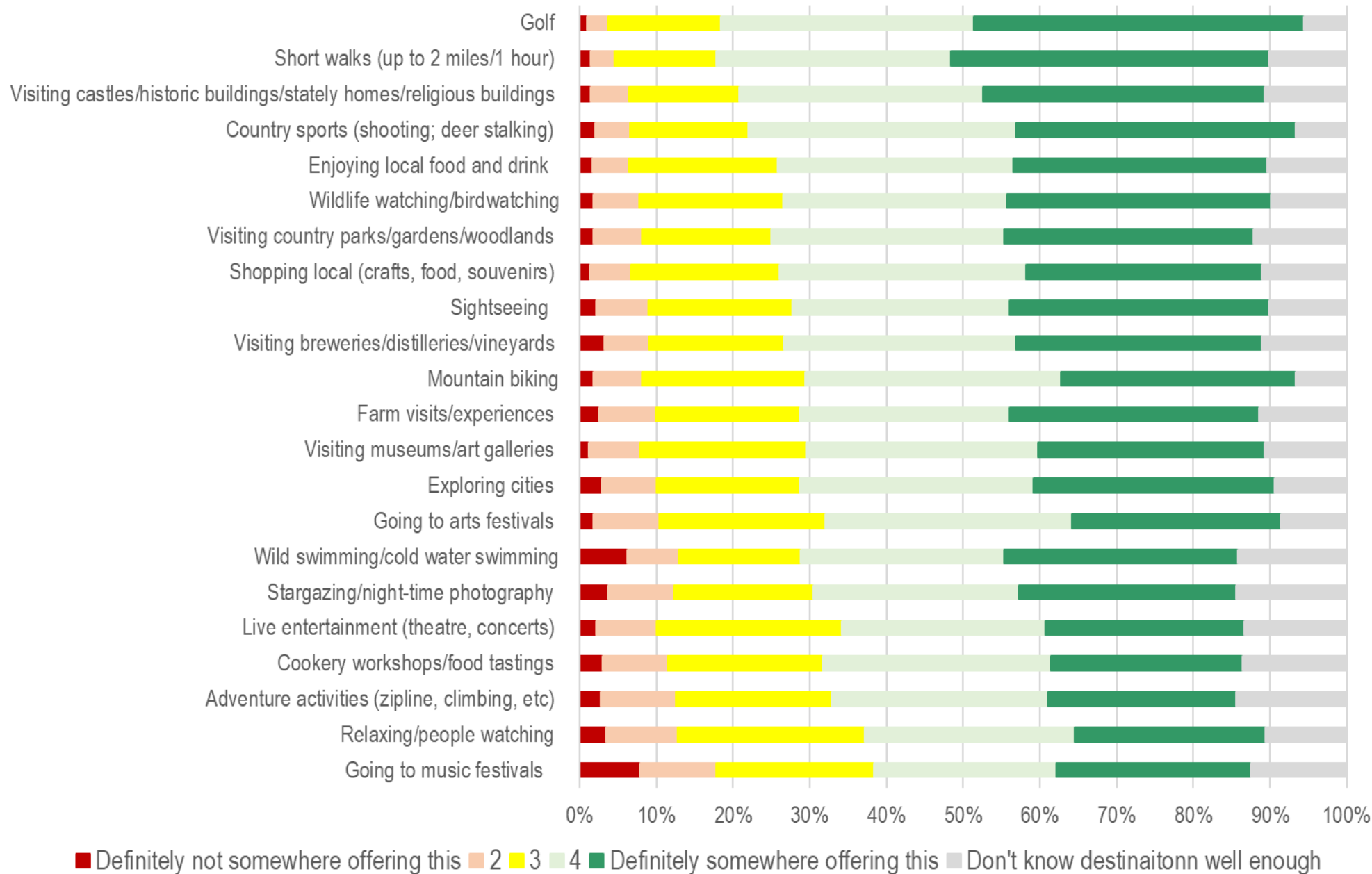
Words/phrases for Aberdeen City



Words/phrases for Aberdeenshire



Does City/Shire offer activities that are enjoyed?



About the analysis

- While a limited amount of multivariate analysis has been presented here, there are considerable opportunities to mine the data further
- The analysis was undertaken and slides prepared by Scattered Clouds on behalf of VisitAberdeenshire in October 2025