
Welcome

to the ultimate business network

Christmas Village Research 2017

Aberdeen Inspired

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Methodology

	2016 Christmas Village visitor survey	2017 Christmas Village visitor survey	2016 Local business impact survey	2017 Local business impact survey
Fieldwork dates	09/12/2016 – 21/12/2016	17/11/2017 - 23/12/2017	10/01/2017 – 13/01/2017	05/01/2018 - 26/01/2018
Research method	Face-to-face interviews	Face-to-face interviews	Telephone consultations	Online survey
Number of completed surveys	254*	385	4	11

Summary

- 40% of visitors reported that the Christmas Village was their main reason for being in the City Centre
- 71% of those interviewed had visited the Christmas Village last year
- 32% stated that the Christmas Village was better or much better in 2017, 38% said it was about the same and 28% stated it was worse or much worse
- 27% of visitors rated the event space/location as excellent
- 74% of visitors rated the Christmas Village as excellent or good overall
- 82% of visitors strongly agree that they'd like to see the village repeated next year, however visitors would like to see more stalls, greater variety and a bigger village in future years
- Net additional economic impact for the region: £0.5m
- Gross spend per head during visit: £26.11

2017 vs. previous years*

	2015	2016	2017
Spend per head during visit	£18.58	£40.87	£26.11
Spend per head on-site	£5.61	£10.74	£11.88
Gross impact	£9.59m	£21.1m	£10.4m
Net additional impact	£1.95m	£1.7m	£0.5m
Overall rating (% rating it excellent/good)	76%	67%	74%
Recommend to friends and family (% completely likely to)	23%	38%	31%
Desire to see it repeated next year (% strongly agreeing)	57%	74%	82%

*Please note that some caution should be taken when directly comparing 2015 due to the smaller sample and different fieldwork methodology (i.e. our independent fieldwork team conducted the surveys from 2016 onwards) – excludes multiplier impacts

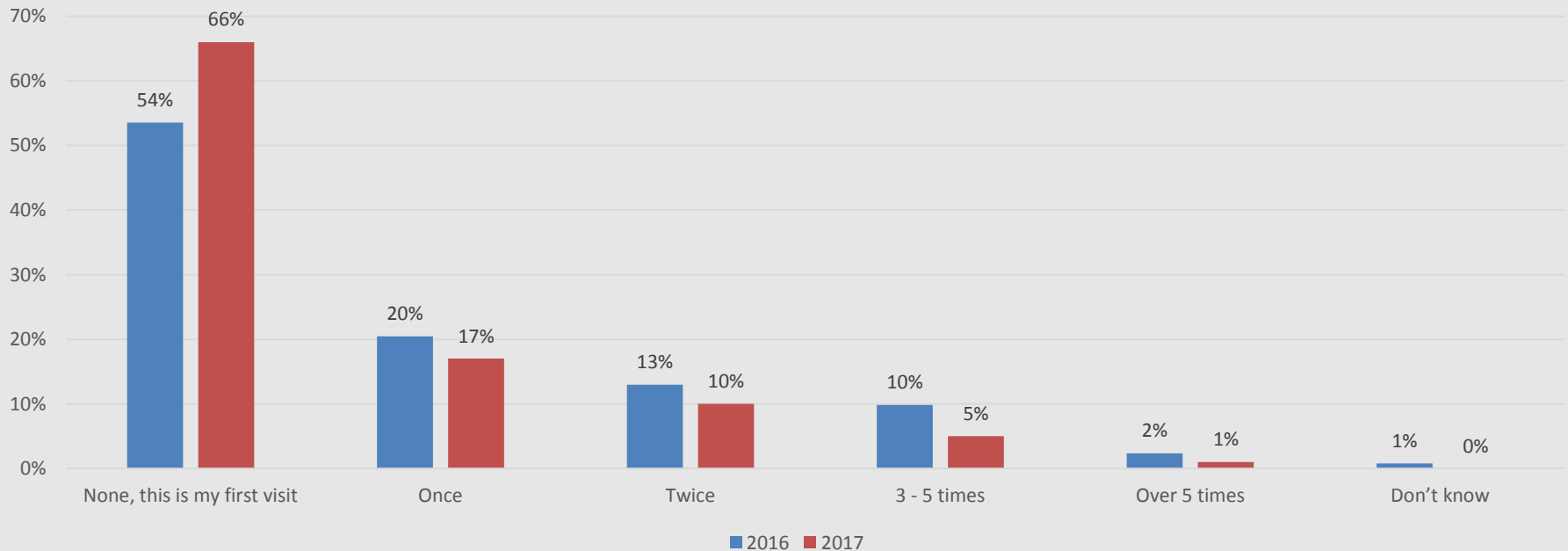
Christmas Village Visit

66% of visitors were visiting for the first time when interviewed

27% had been 1-2 times already

6% had visited 3 or more times

How many times, before today, have you visited the Christmas village this year?

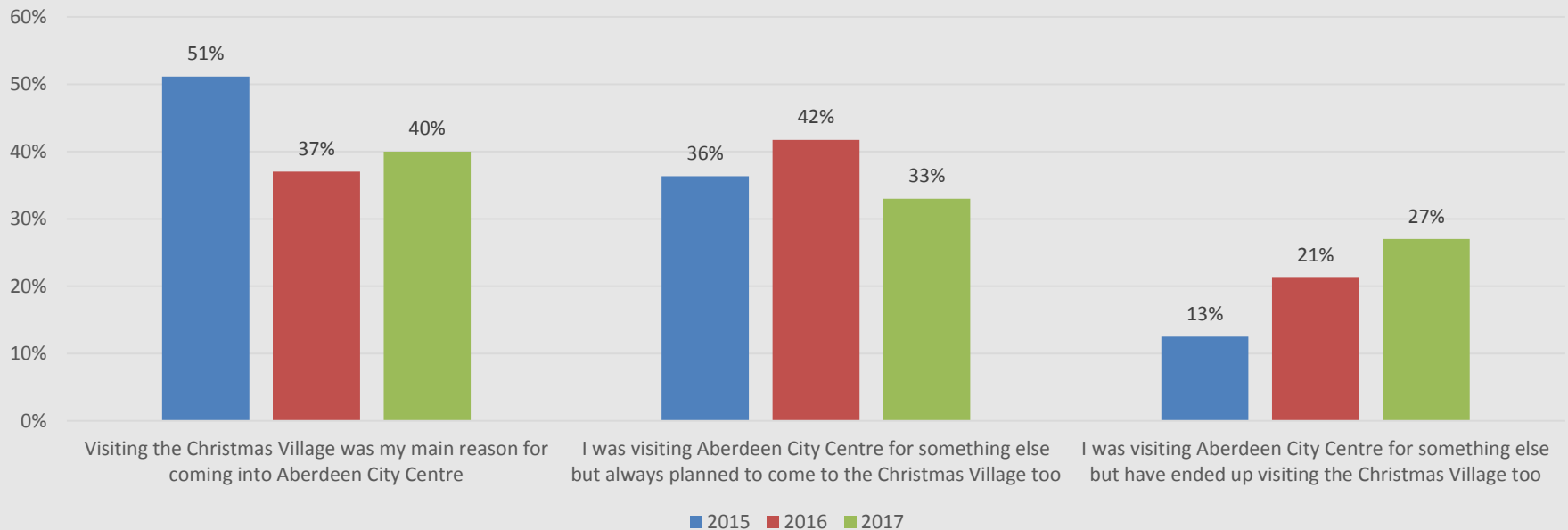


2016: N = 254; 2017: N = 383

Christmas Village Visit

40% of visitors reported that the Christmas Village was their main reason for being in the City Centre

Which of the following statements best describes your reason to be here today?



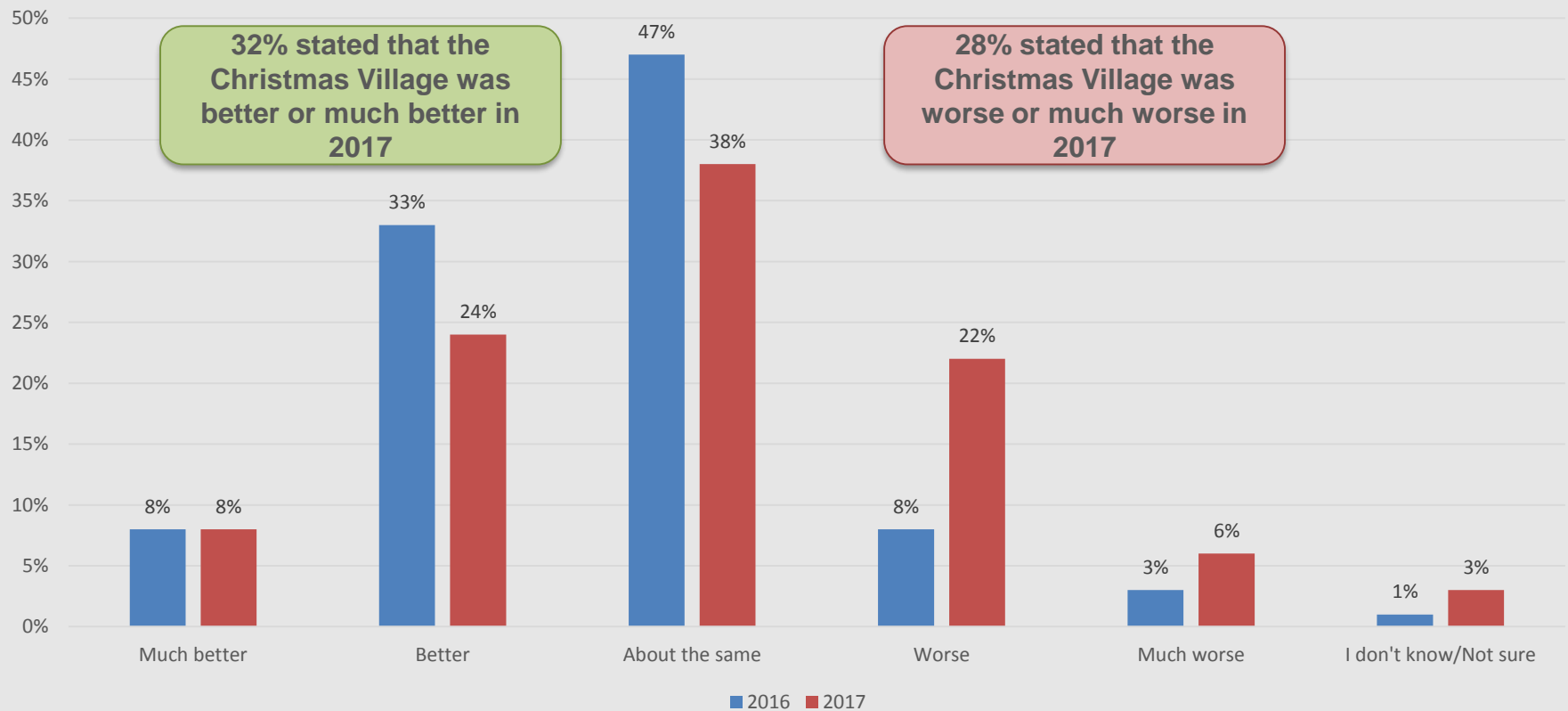
Those who had visited last year were more likely to state that the Christmas Village was their main reason for coming into the City Centre than those who did not (44% vs. 30%)

2016: N = 254; 2017: N = 381

Perceptions of the Christmas Village

71% of those interviewed had visited the Christmas Village last year

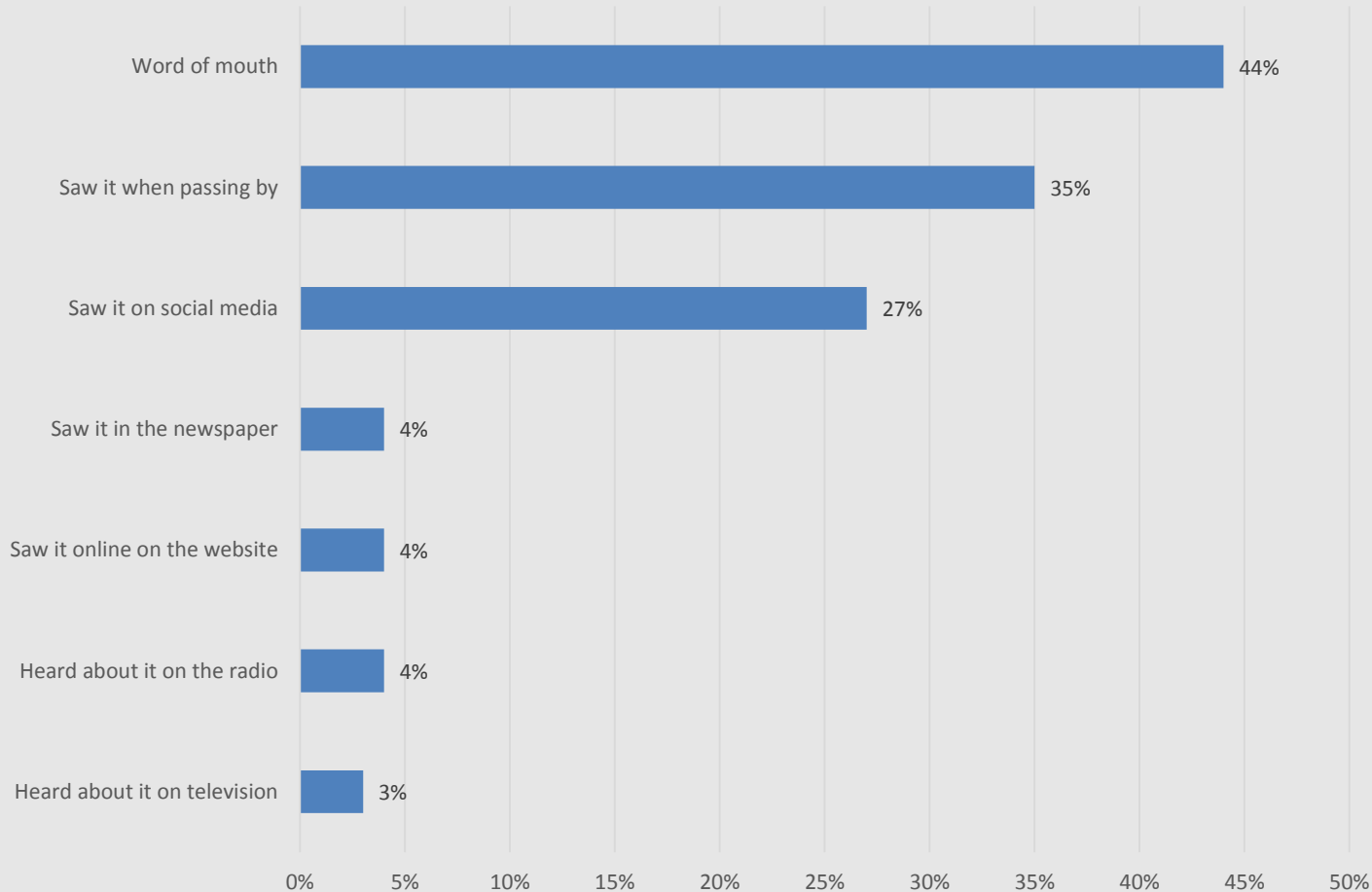
How does the Christmas Village compare to last year?



2016: N = 155; 2017: N = 274

Awareness and marketing

How did you hear about the Christmas Village this year?



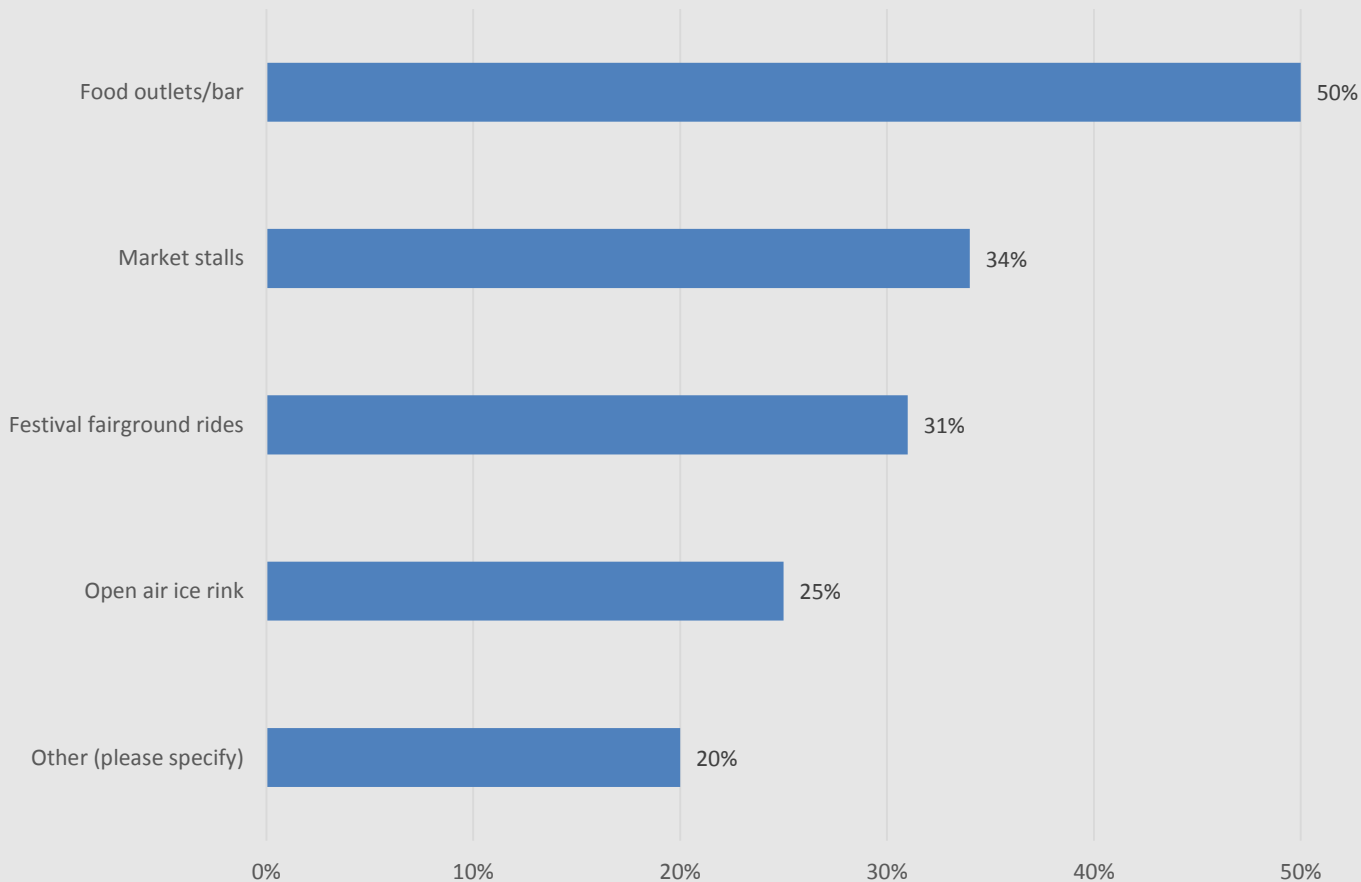
Others reasons given* included *“it’s on every year”*, suggesting people have come to expect it

N = 384

* 7% of visitors stated ‘other’ sources

Visit triggers

What attracted you to the Christmas Village this year?



Rather than a specific aspect of the village, some had been attracted by:

“The lights”

The *“combination”* of everything

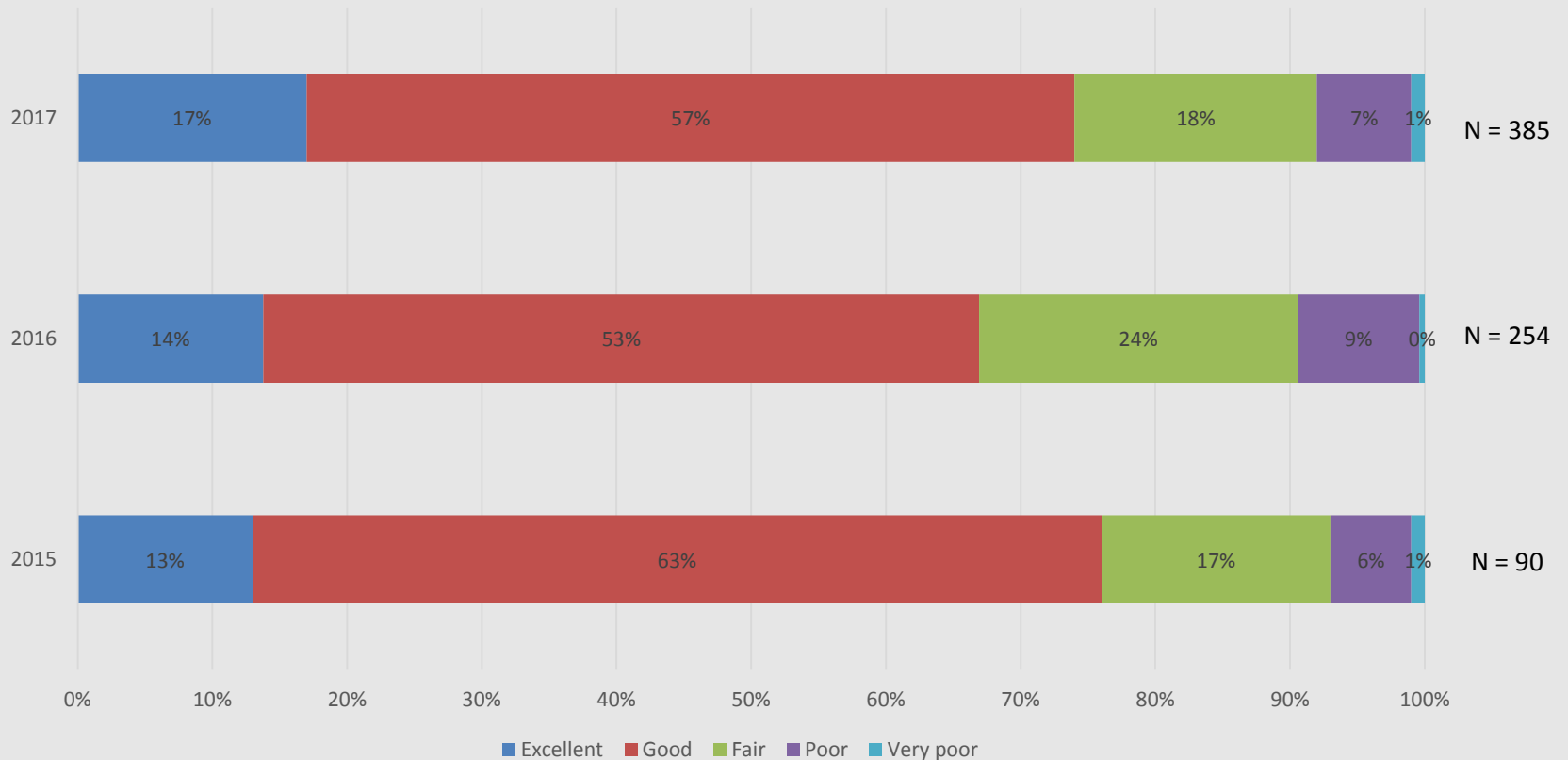
Their *“love of Christmas”*

N = 371

Perceptions of the Christmas Village

74% of visitors rated the Christmas Village excellent or good overall, compared to 67% in 2016

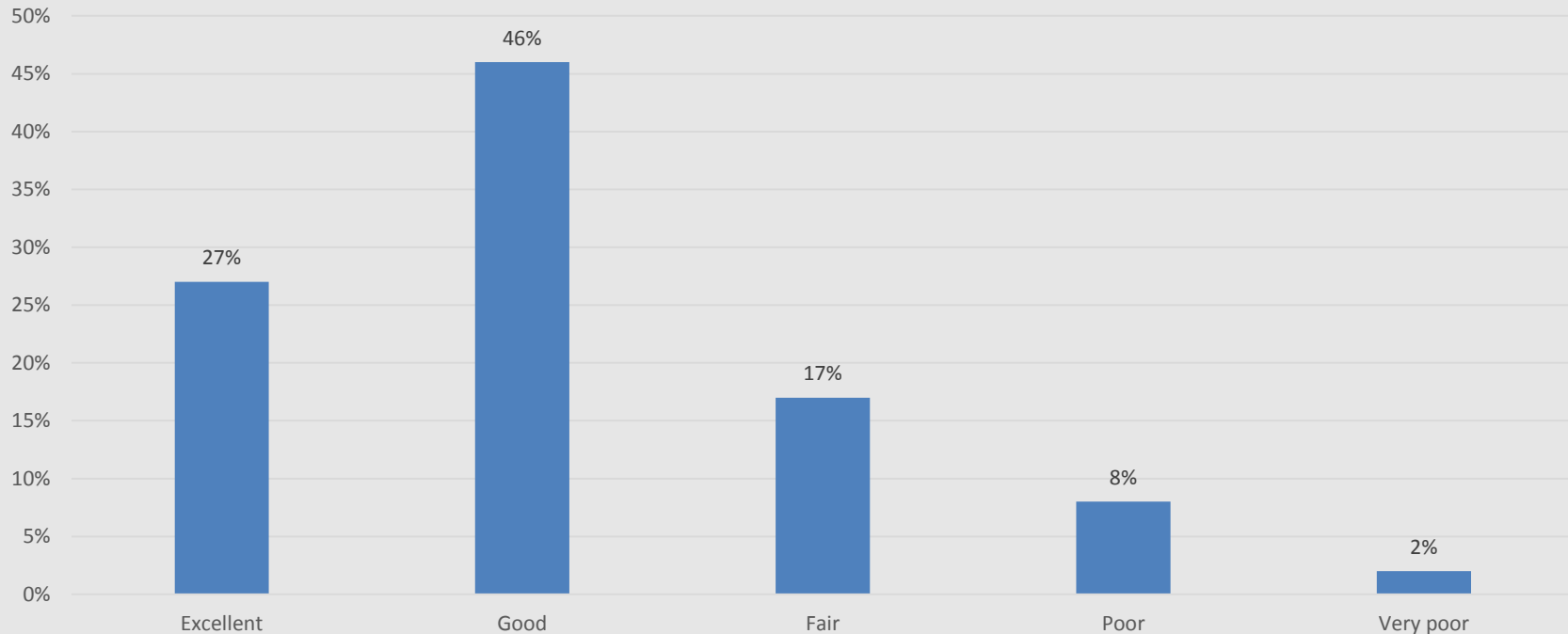
Overall rating of the Christmas Village



Perceptions of the Christmas Village

27% of visitors rated the event space/location as excellent

How would you rate the event space/location?



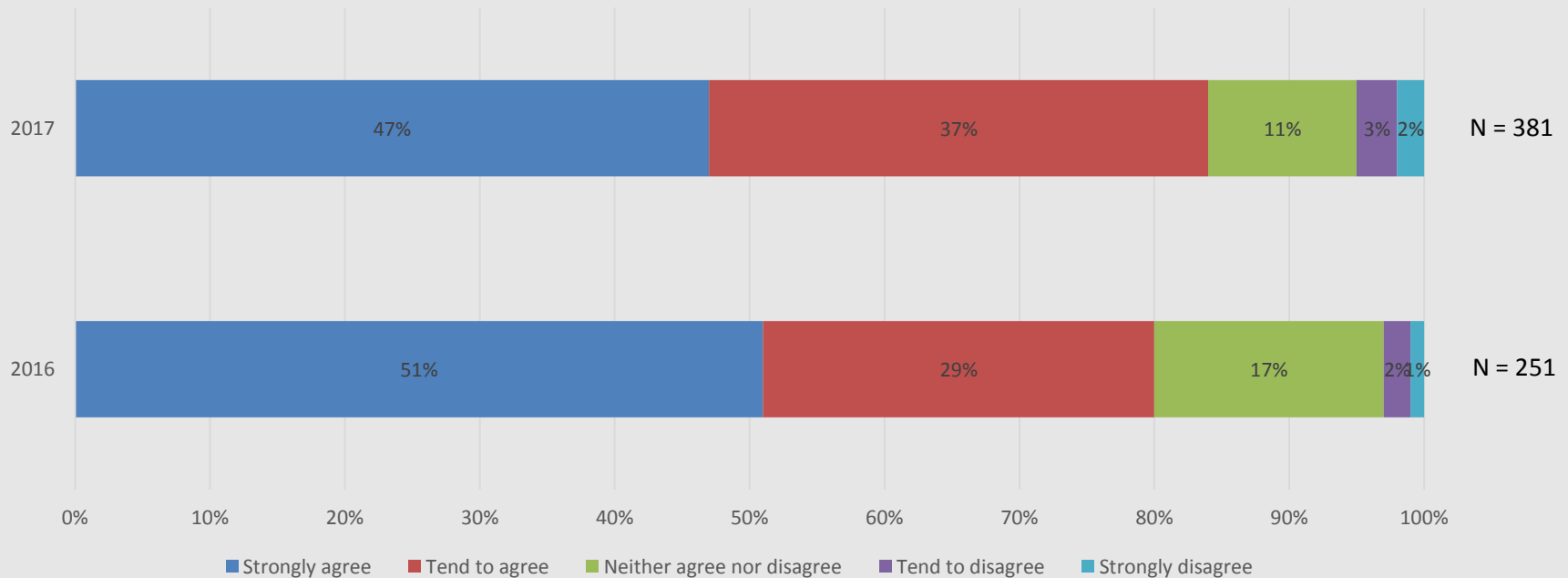
69% of respondents who had visited the village in 2016 rated the 2017 space/location as excellent or good, compared to 82% of those who had not

N = 378

Perceptions of the Christmas Village

47% of visitors strongly agreed that the Christmas Village had a positive impact on their perception of Aberdeen

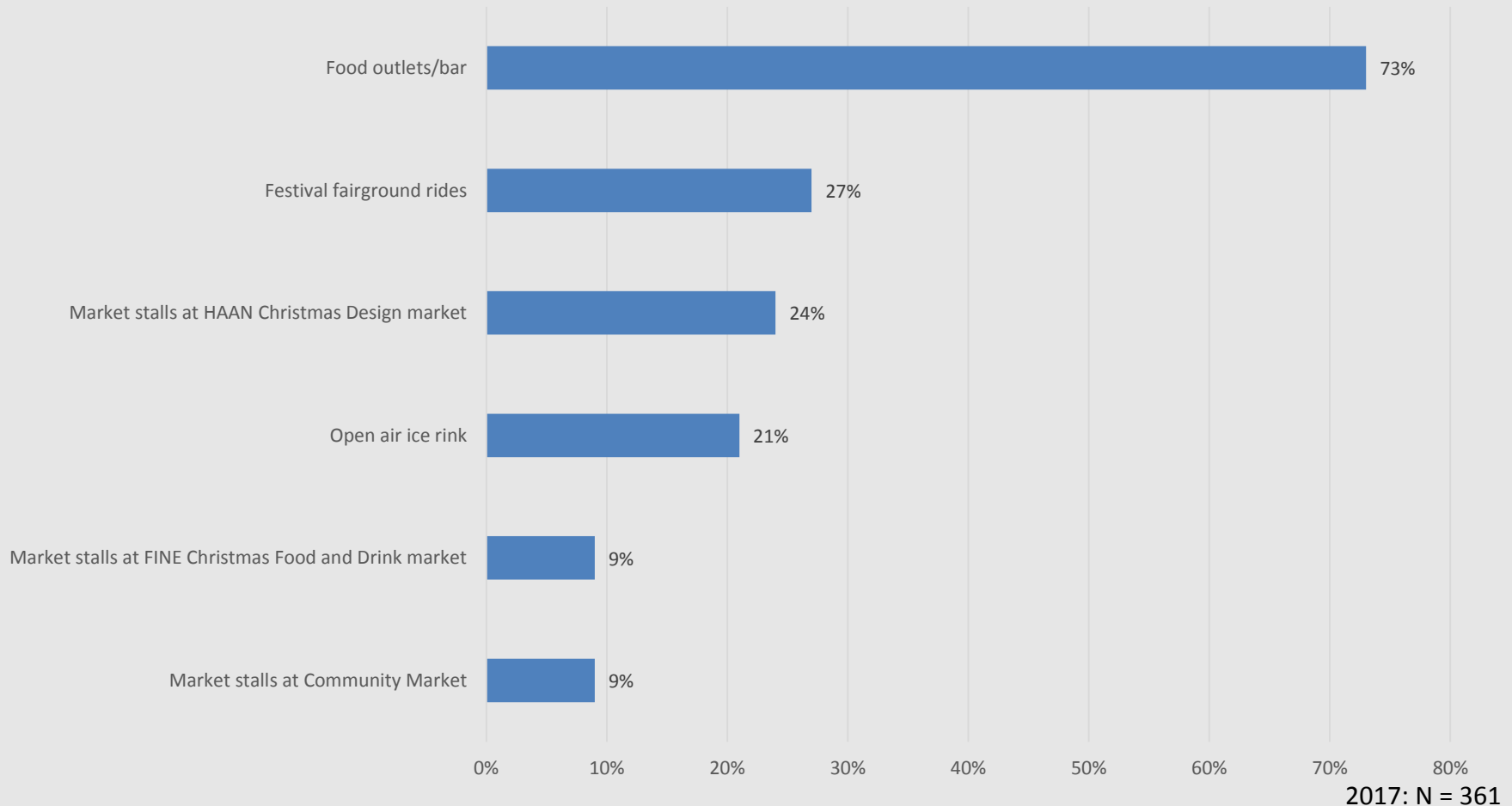
The Christmas Village has had a positive impact on my perception of Aberdeen



26% of North-east residents strongly agreed that the Christmas Village increased their pride in Aberdeen

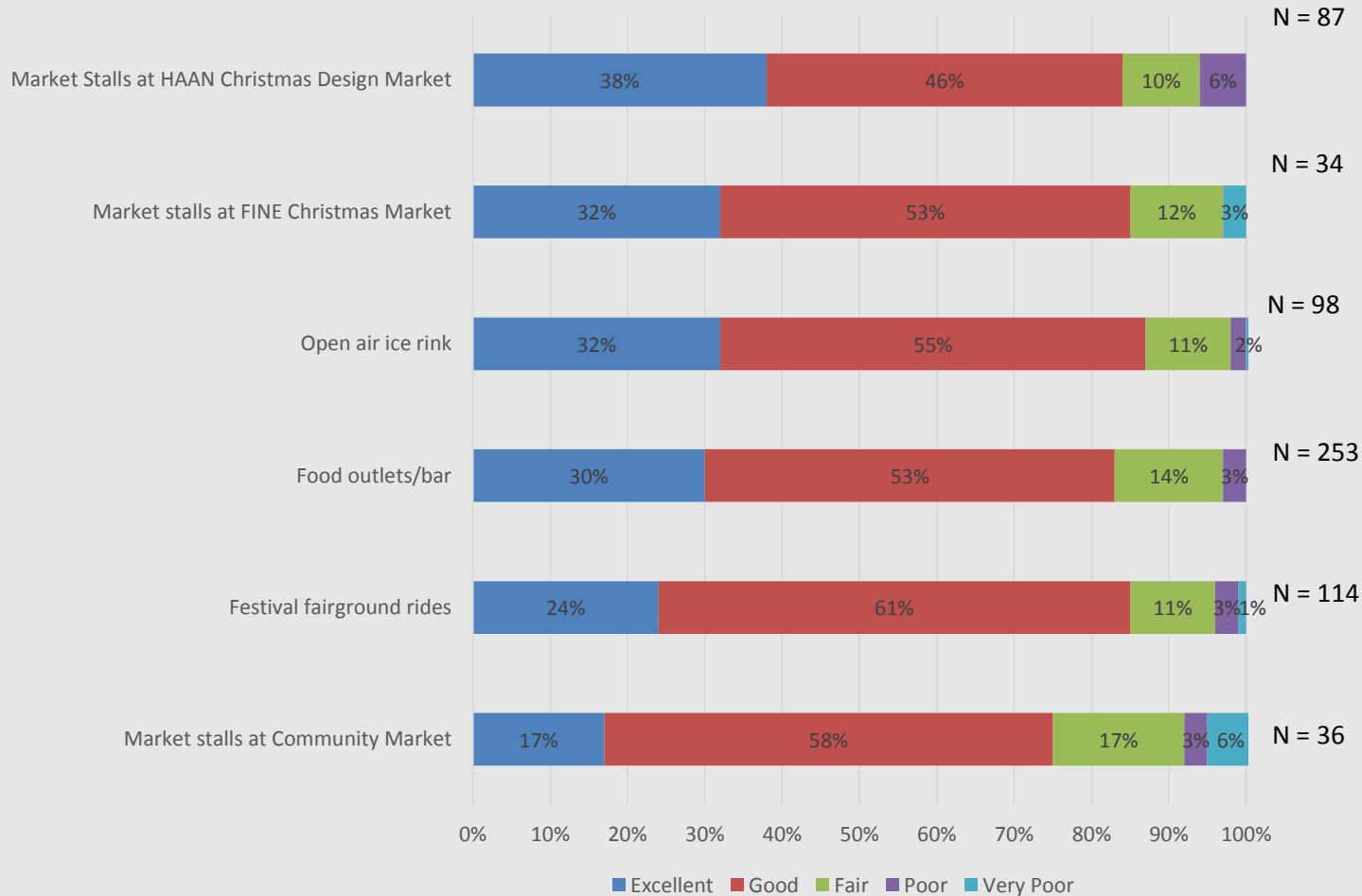
Christmas Village attractions

Which of the following elements of Christmas Village have you used or bought from?



Rating of attractions

How would you rate the following:

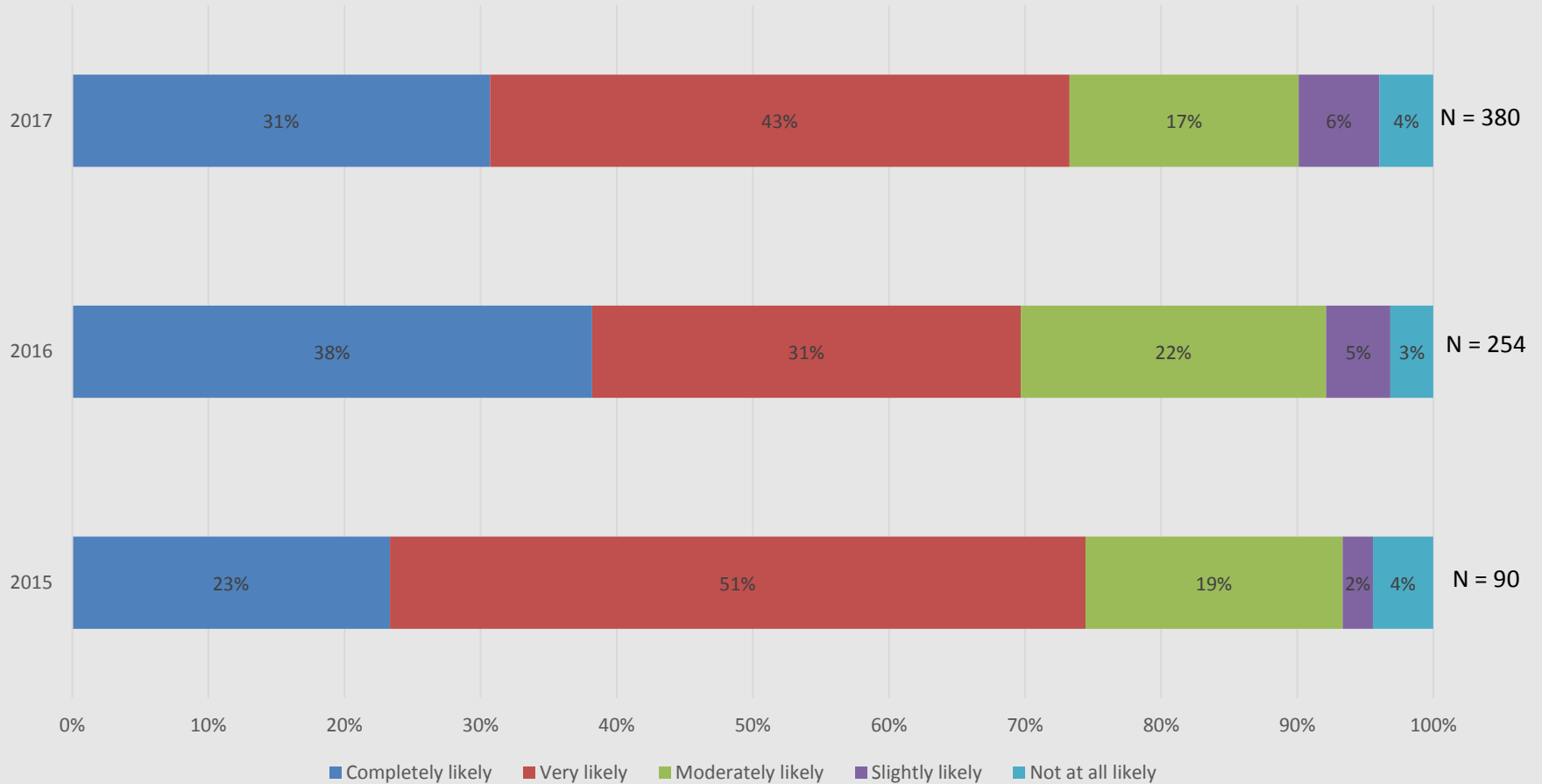


38% rated the HAAN market as 'Excellent'

17% rated the Community Market as 'Excellent'

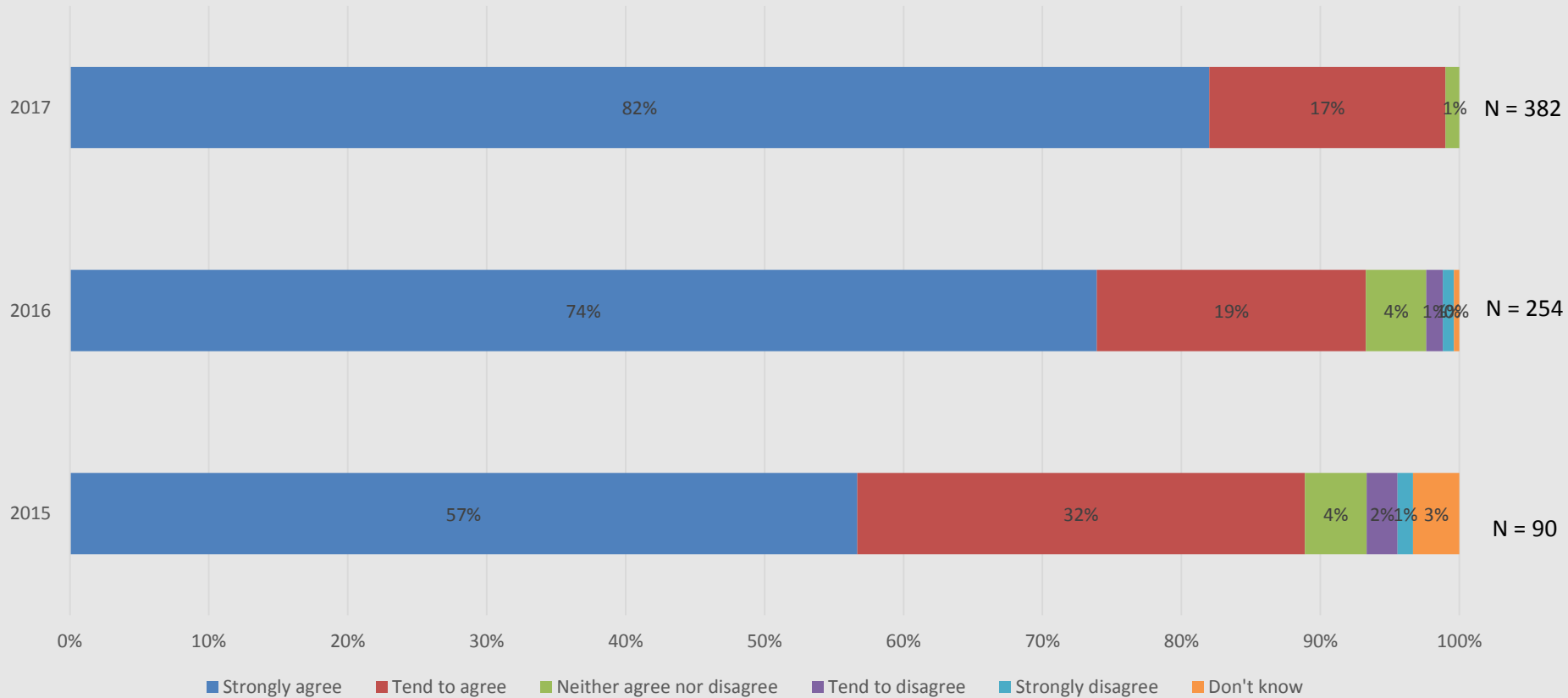
Advocacy for the Christmas Village

How likely or unlikely are you to recommend friends and family to visit Christmas Village in the future?



Advocacy for the Christmas Village

I would like the Christmas Village to be repeated in Aberdeen next year



Gross spend per head

Method

1. Surveyed visitors on
 - a. Spend using various categories
 - b. Reason for visit
 - c. Resident location
 - d. Whether this was their first visit or how many times they had visited
2. Used reported footfall data i.e. number of visitors
 - a. Applied a discounting value based on 1d to assess 'unique visits'

	Xmas village	Local travel, i.e. to get to Aberdeen City Centre	Food, drink, shopping, etc. outside the event	Other shopping	Anything else (e.g. parking etc.)	Total
Spend per head (rounded) 2017	£11.88	£1.17	£4.34	£8.34	£0.38	£26.11
Spend per head (rounded) 2016	£10.74	£2.40	£7.26	£19.82	£0.65	£40.87

Economic Impact

	The Christmas Village itself	Local travel, i.e. to get to Aberdeen City Centre	Food and drink outside the event	Other shopping outside the event	Anything else (e.g. parking etc.)	Total
Gross Total Economic impact	4,751,839	467,160	1,737,598	3,337,227	151,823	10,445,646
Net economic impact after removing 'deadweight'¹	2,507,953	246,560	917,079	1,761,341	80,130	5,513,064
Net additional to region²	174,433	30,084	101,731	193,961	0	500,209

1. Deadweight is a measure / reduction to allow for spending which would have happened anyway without the Christmas Village being there

2. Net additional – This is an assessment of what can be attributed to visitors from out of the region i.e. £500,209 was from people not from Aberdeen or Aberdeenshire.

3. All excludes multiplier analysis

Notes:

- i. The analysis is reliant on footfall data provided (estimated at 400,000)
- ii. The analysis takes no account of the impact of the delivery of the event (i.e. the economic impact of delivering infrastructure etc. to the local economy)
- iii. The analysis does not assess leakage of the above spend i.e. for companies who are not based in the region. E.g. a business could earn money but its suppliers are outside the North-east and its base including employees may be outside the North-east

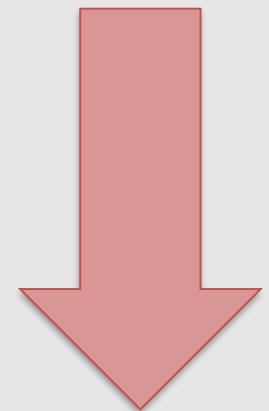
Economic Impact

- On-site spend at the Christmas Village was up by £1.14 per head
- However, off-site spend and gross impact was lower in 2017 than in 2016
- As well as changes to visitor numbers*, several additional factors may have impacted on this:
 - Factors relating to the Christmas Village (e.g. the Christmas Village was situated at a new location in 2017 and differed in its offering)
 - Factors relating to the fieldwork (e.g. the fieldwork period was extended in 2017 and began in November to ensure surveys were conducted at each of the three markets. This may have meant proportionally we captured fewer people who had been Christmas shopping)



On-site
spend
increased

Off-site
spend and
gross impact
decreased



* We used an estimate of 400,000 visitors in 2017 compared to 515,972 in 2016

Looking forward

- What else, if anything, would you like to see at the Christmas Village in the future?
 - *“A better selection of stuff to do. Not great selection of rides, stalls or bars - compared to last years village and Christmas markets elsewhere”*
 - *“Better signs, more awareness to markets in HAAN. Don't assume everyone has a newspaper”*
 - *“Fine as it is”*
 - *“More lights and a more Christmassy atmosphere”*
 - *“More of everything, stalls, rides”*
 - *“More events and promote it better”*
 - *“The village should be a lot bigger - more stalls and markets”*

Frequently used words

“More” “Stalls”

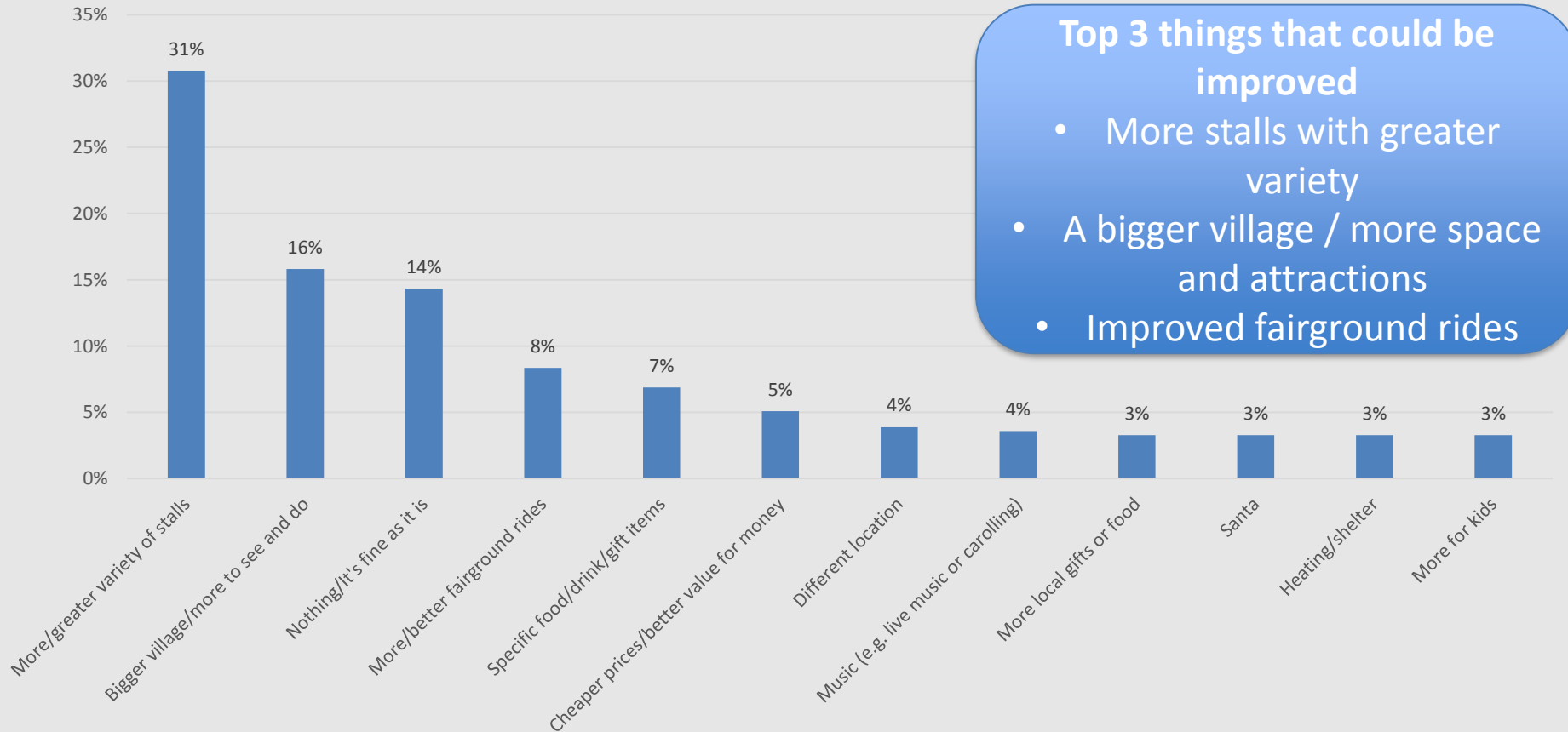
“Market” “Food”

“Rides” “Better”

“Bigger”

Looking forward

What would you like to see at the Christmas Village in the future?

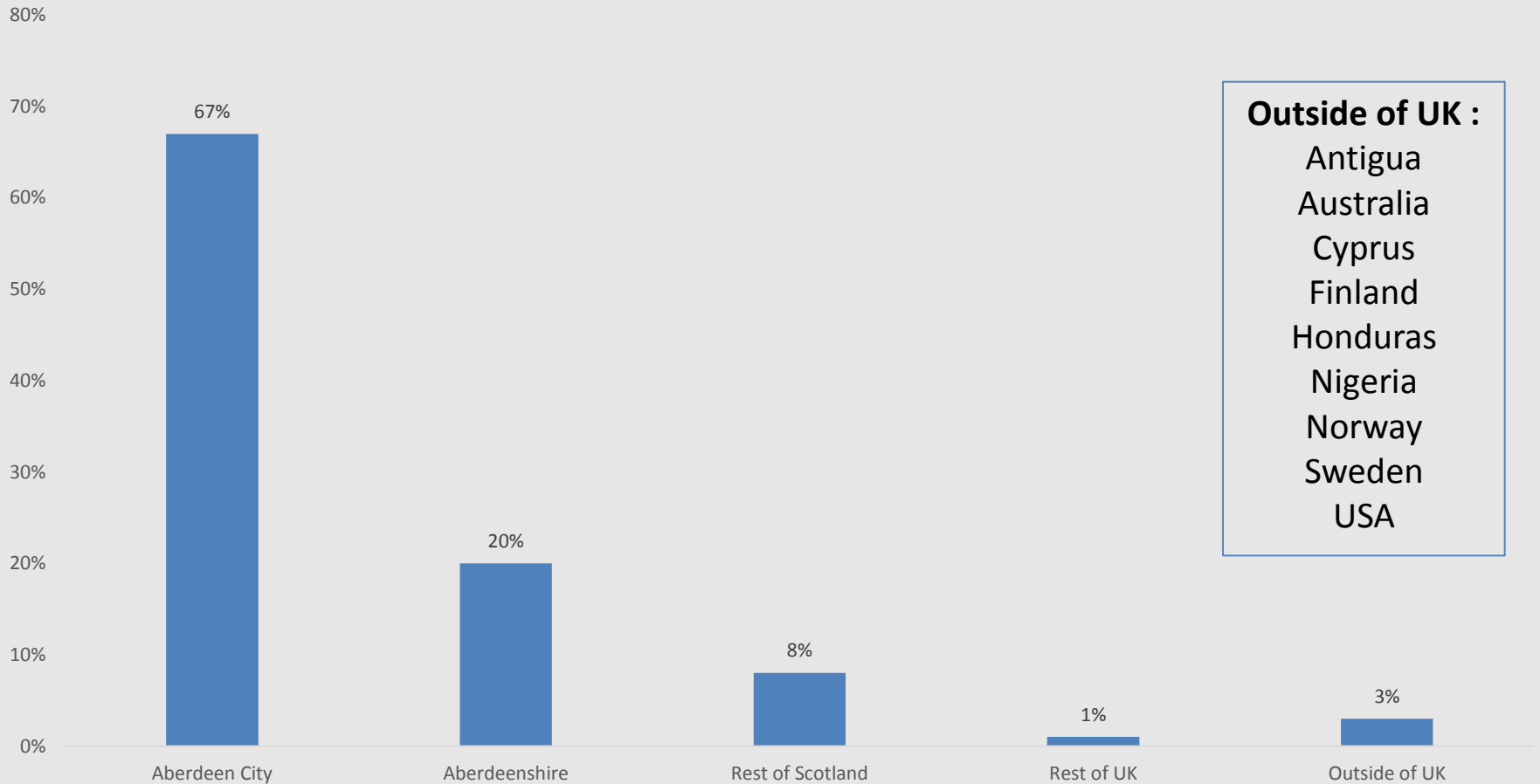


2017: N = 335

**Open-ended responses were coded and those mentioned by at least 11 respondents have been included*

Visitor Demographics

Where have you travelled from today to attend the Christmas Village?

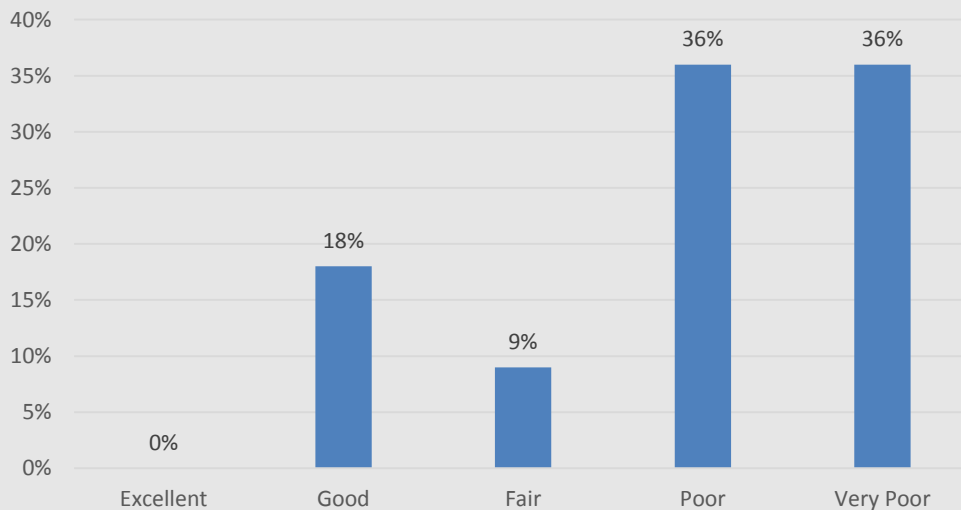


N = 376

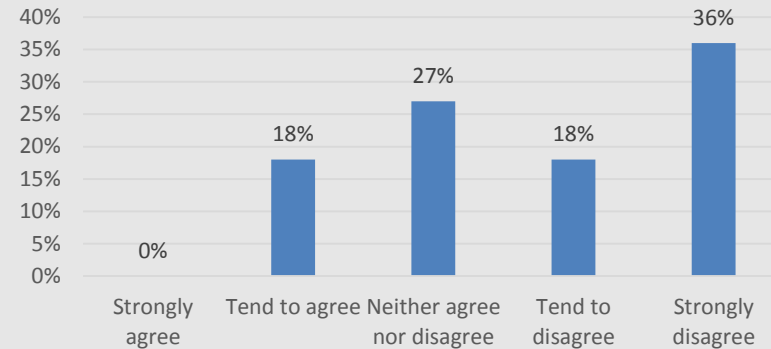
Views from business

- 11 businesses shared their views on the Christmas Village via our online survey
- Although views were mixed, the majority of these businesses did not agree that the Village had a positive impact on their business

How would you rate the Christmas Village overall in terms of its impact on your business?



"The 2017 Christmas Village had a positive impact on my business"



Why do you say this?

"I believe the fact the village was on Broad Street was positive, but the size and composition of the content was much poorer than expected."

"Very few people I spoke to were aware of it"

N = 11

Views from business

- *Footfall and turnover:* Businesses generally did not feel that the Christmas Village had any direct impact on business
 - One business did report a positive impact which was perceived to have been partly due to the Village, however this was not as strong as in 2016
- Other factors including bad weather and road closures were perceived to have impacted on business performance over the period

“The location of the village is absolutely right, particularly given the investment on Broad Street. However the size of the offer is much lower than is needed”

“The event did not present Christmas, all it did was give a Codona’s fairground in town which has been done before. It was poorly sign posted and advertised.”

“It brought lots of people [...] on opening weekend, but we didn't get much footfall after that.”

Thank You

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