

Christmas Village Research 2018

Aberdeen Inspired

Interim report – January 2018



**Aberdeen &
Grampian
Chamber of
Commerce**

Methodology

| | 2016 Christmas Village visitor survey | 2017 Christmas Village visitor survey | 2018 Christmas Village visitor survey |
|--------------------------------|---|---|---|
| Fieldwork dates | 09/12/2016 – 21/12/2016 | 17/11/2017 - 23/12/2017 | 22/11/2018- 20/12/2018 |
| Research method | Face-to-face interviews | Face-to-face interviews | Face-to-face interviews |
| Number of completed surveys | 254 | 385 | 502 |

**90 responses were gathered in 2015*



Summary

- 48% of visitors reported that the Christmas Village was their main reason for being in the City Centre
- 62% of those interviewed had visited the Christmas Village last year
- 72% stated that the Christmas Village was better or much better in 2018, 20% said it was about the same and 4% stated it was worse or much worse
- 34% of visitors rated the event space/location as excellent
- 78% of visitors rated the Christmas Village as excellent or good overall
- 59% of visitors strongly agree that they'd like to see the village repeated next year, however visitors would like to see more stalls, a greater variety of food and a bigger village in future years
- Net additional economic impact for the region: £1.2m
- Spend per head during visit: £34.79

2018 vs. previous years*

| | 2016 | 2017 | 2018 |
|--|--------|--------|---------|
| Spend per head during visit | £40.87 | £26.11 | £34.79 |
| Spend per head on-site | £10.74 | £11.88 | £9.53 |
| Gross impact | £21.1m | £10.4m | £21.1m* |
| Net impact after removing 'deadweight' | £10.3m | £5.5m | 10.1m* |
| Net additional impact | £1.7m | £0.5m | £1.2m* |
| Overall rating (% rating it excellent/good) | 67% | 74% | 78% |
| Recommend to friends and family (% completely / very likely to) | 69% | 74% | 68% |
| Desire to see it repeated next year (% strongly / tending to agree) | 94% | 99% | 94% |

**Please note that we have adjusted the 2018 footfall figure on which these figures are based, see slides 20-21 for further explanation.*



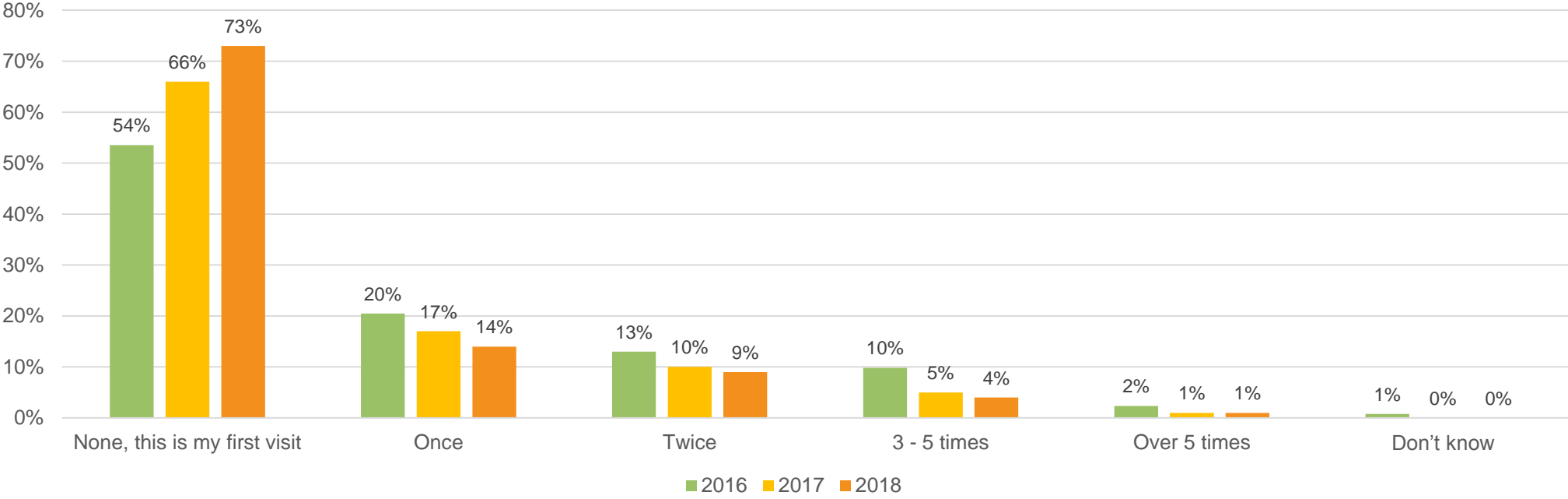
Christmas Village Visit

73% of visitors were visiting for the first time when interviewed

23% had been 1-2 times already

5% had visited 3 or more times

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



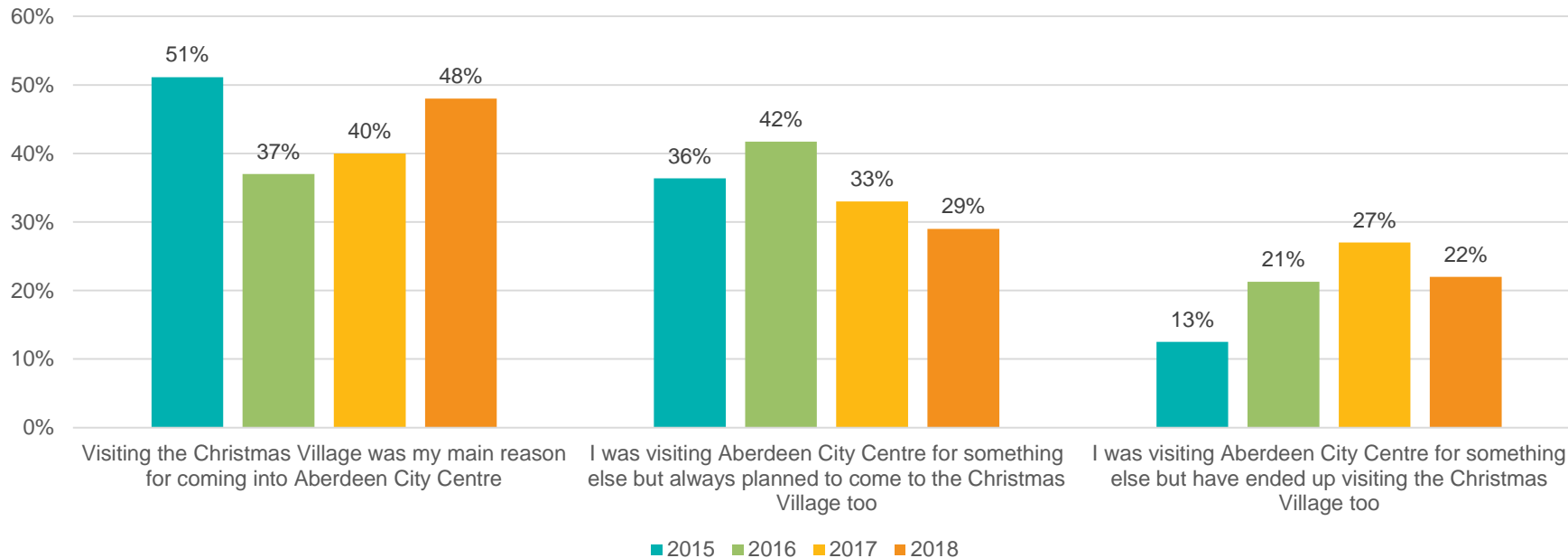
2016: N = 254; 2017: N = 383; 2018: N = 501



Christmas Village Visit

48% of visitors reported that the Christmas Village was their main reason for being in the City Centre, an increase from 40% in 2017

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 (53% vs. 42%)

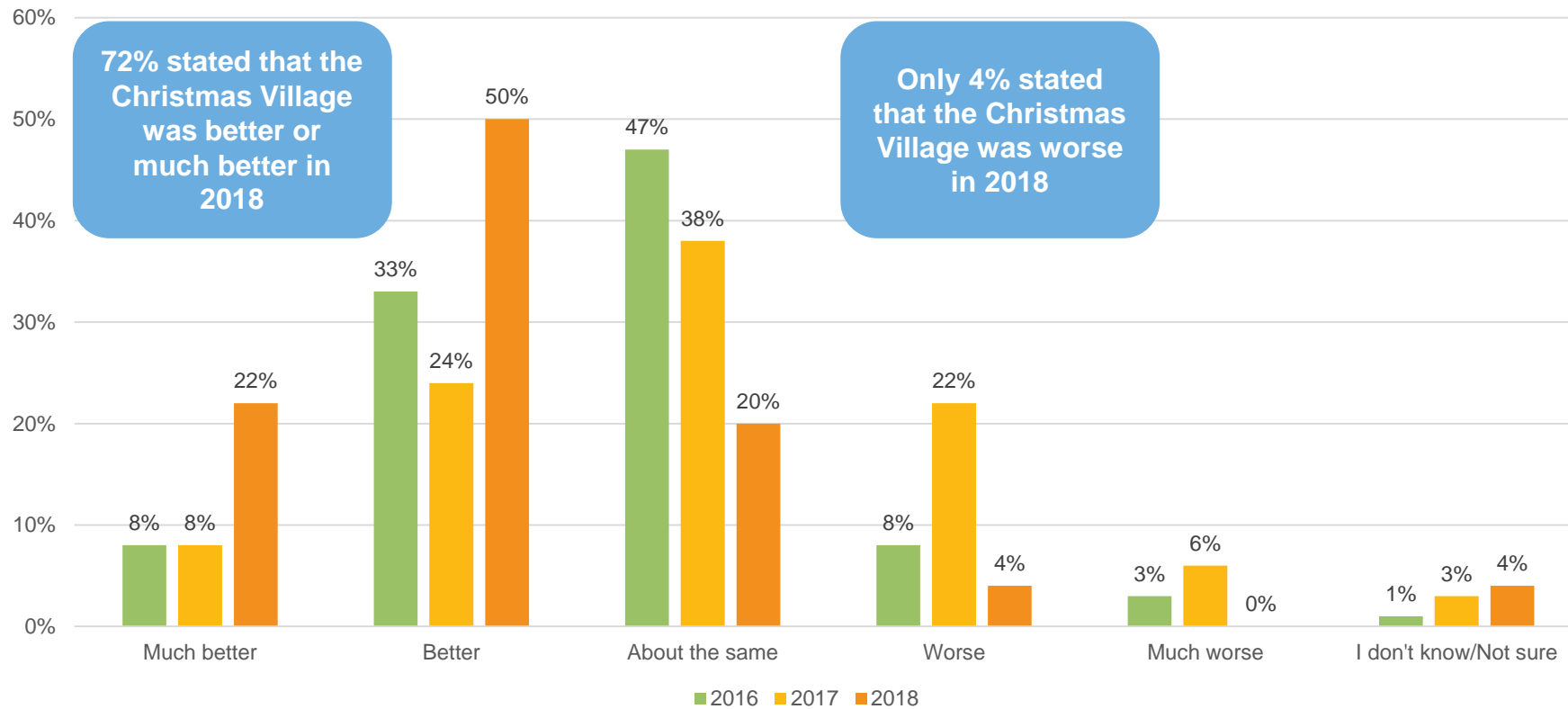
2016: N = 254; 2017: N = 381; 2018: N = 497



Perceptions of the Christmas Village

62% of those interviewed had visited the Christmas Village last year

How does the Christmas Village compare to last year?

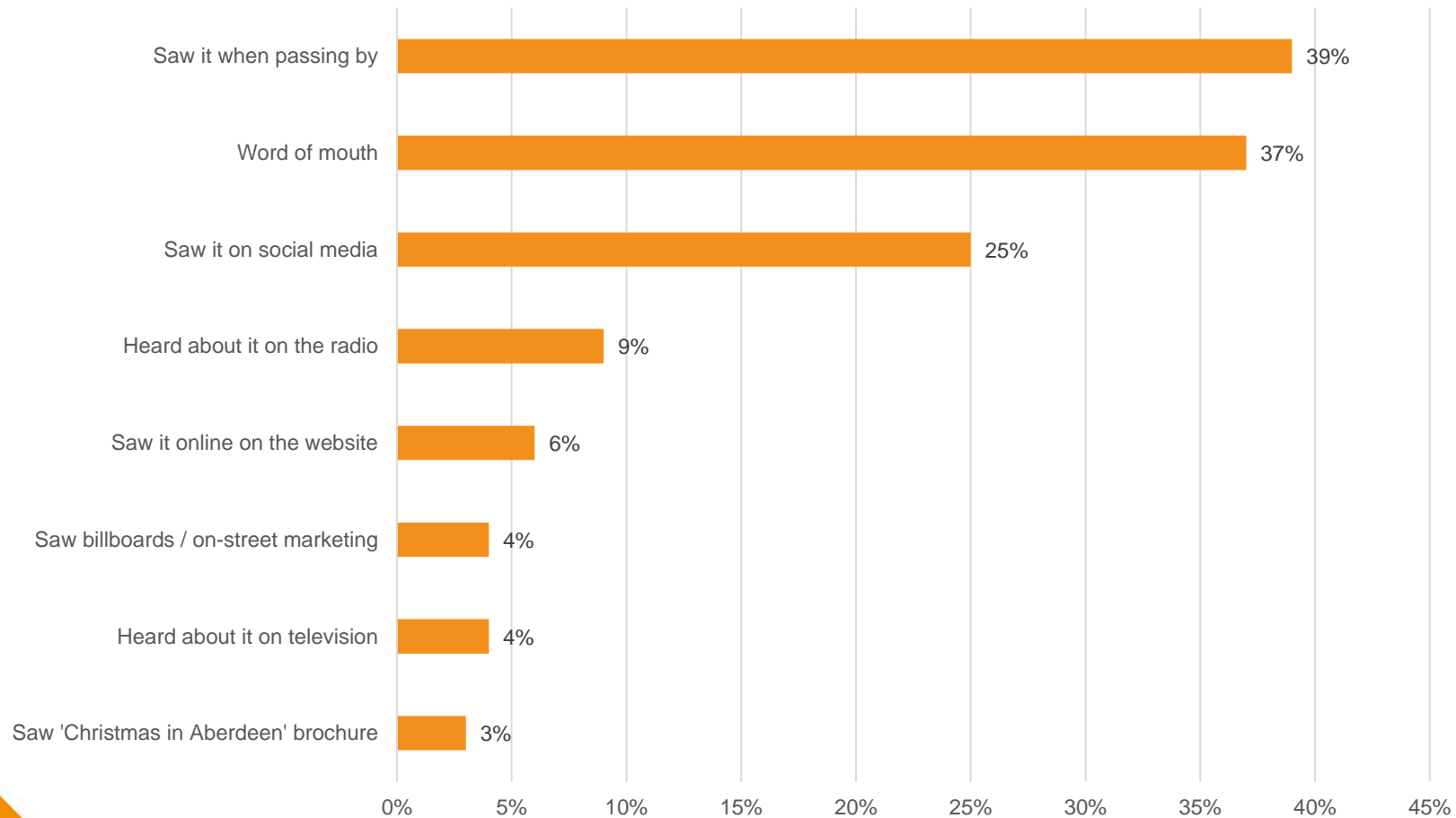


2016: N = 155; 2017: N = 274; 2018: N = 309



Awareness and marketing

How did you hear about the Christmas Village this year?



Other sources of awareness included:

"Assumed it would be on"

"Newspaper"

"Happens every year"

"Booking.com"

* 7% of visitors stated 'other' sources

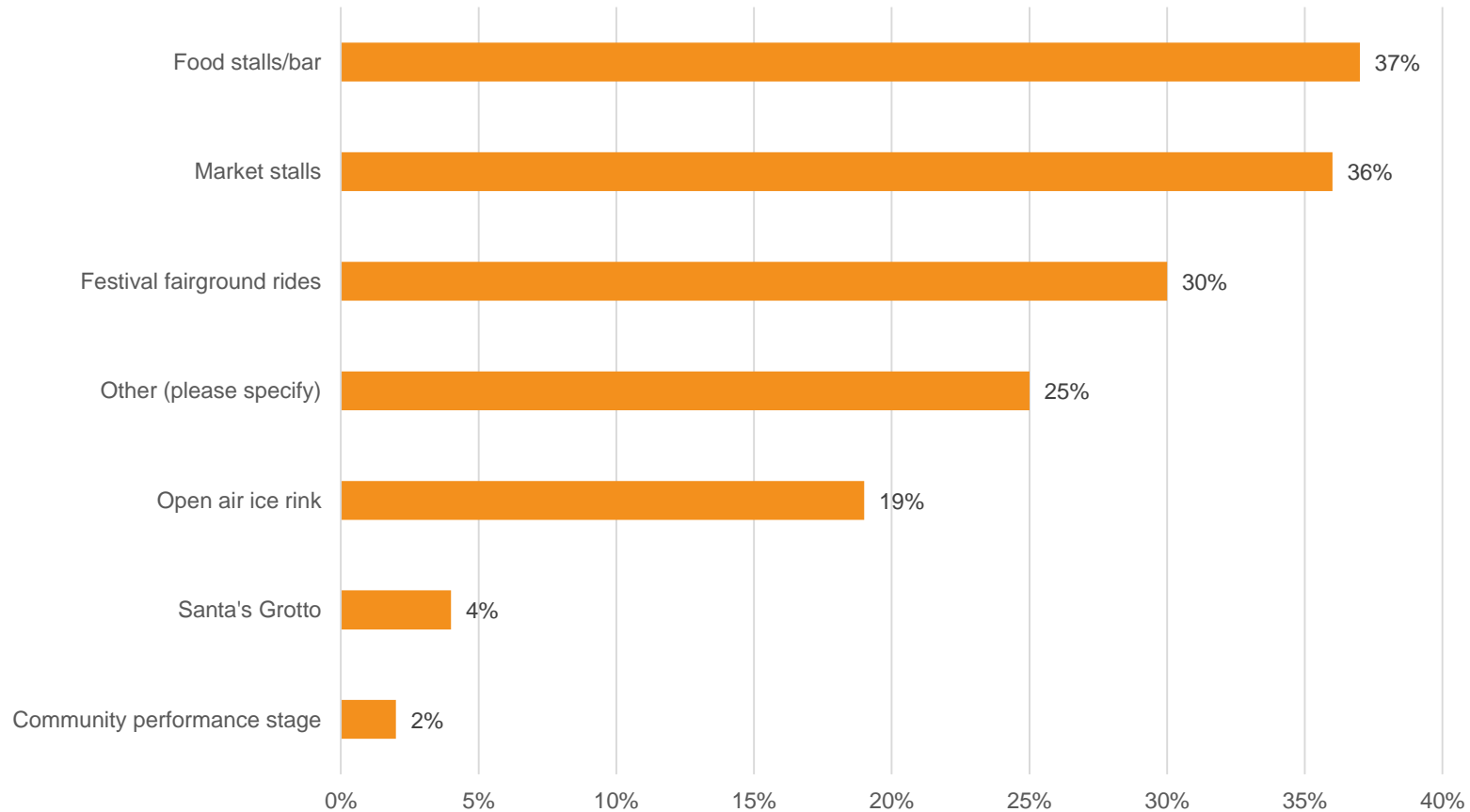
N = 498



Visit triggers

Similar to last year, visitors were most likely to have been attracted to the village due to the food stalls/bar, followed by the market stalls and festival fairground rides

What attracted you to the Christmas Village this year?



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

“Christmas spirit”

“Lights”

“Curiosity”

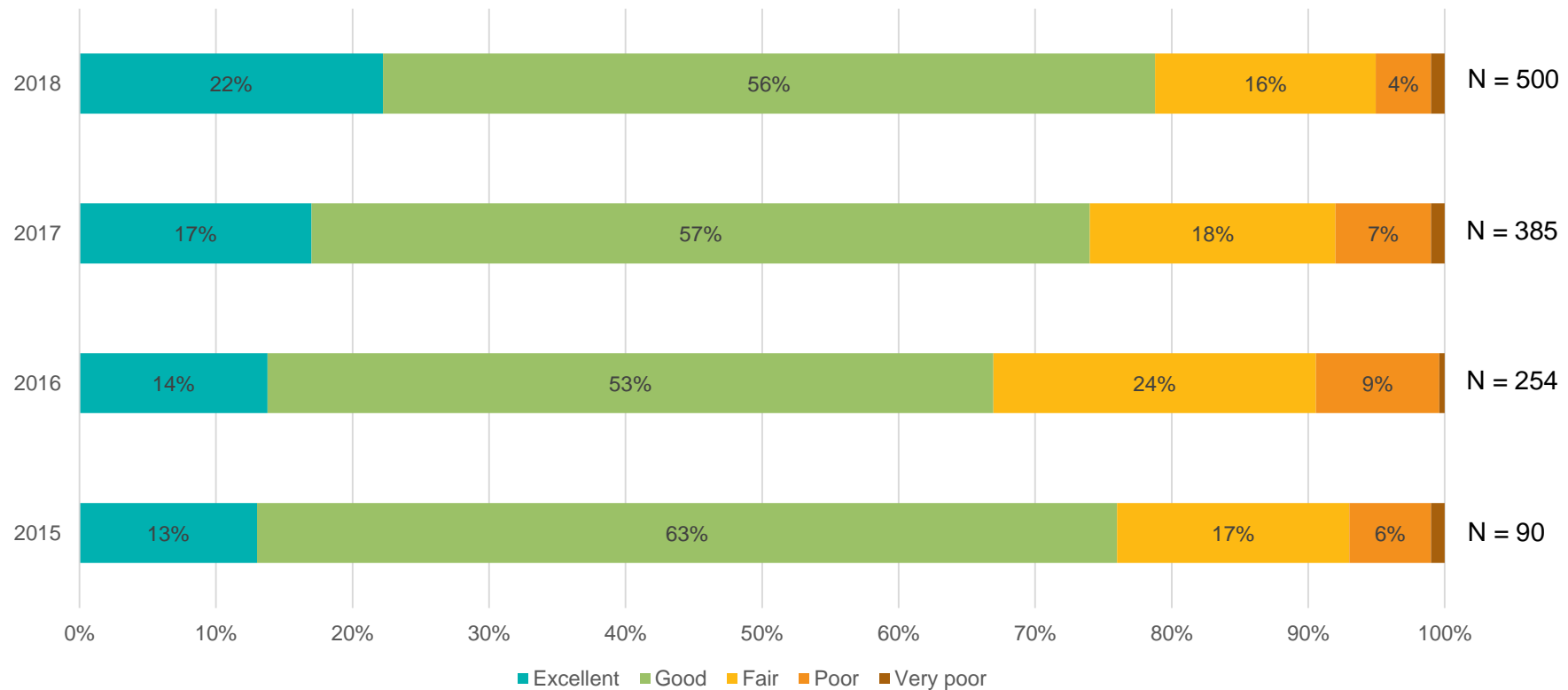
“Mulled wine and atmosphere”

N = 485

Perceptions of the Christmas Village

78% of visitors rated the Christmas Village as excellent or good overall, the highest rating so far

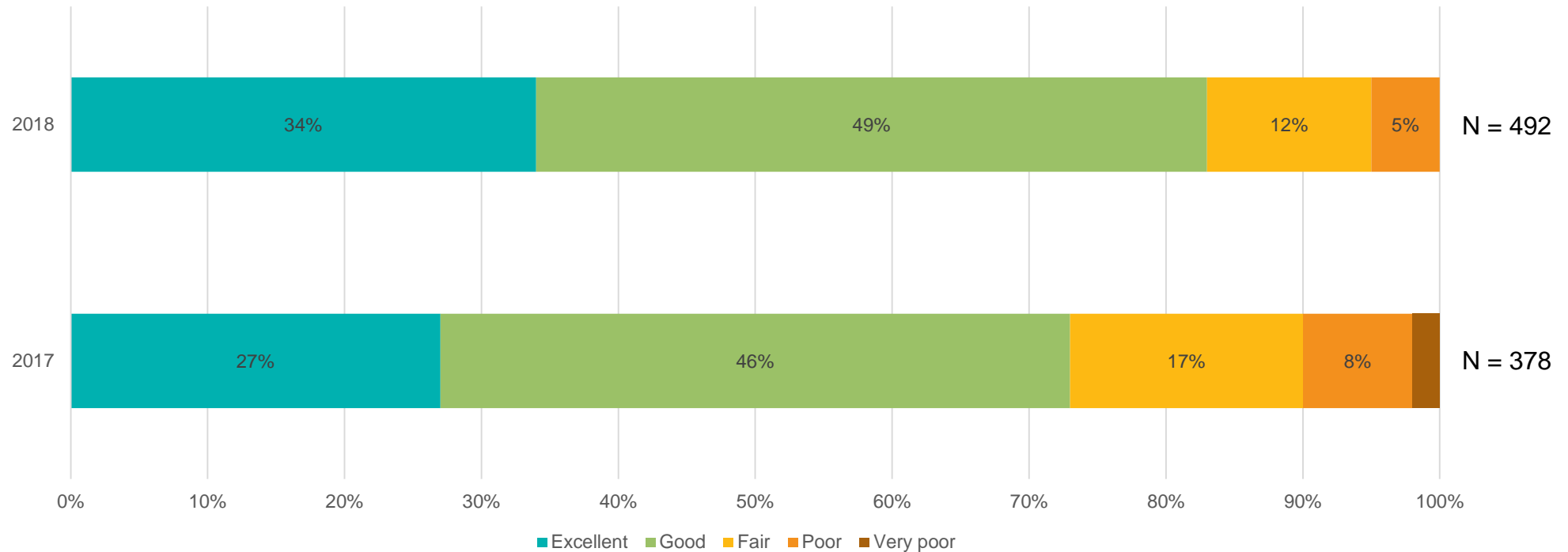
Overall rating of the Christmas Village



Perceptions of the Christmas Village

83% of visitors rated the event space/location as good or excellent

How would you rate the event space/location?



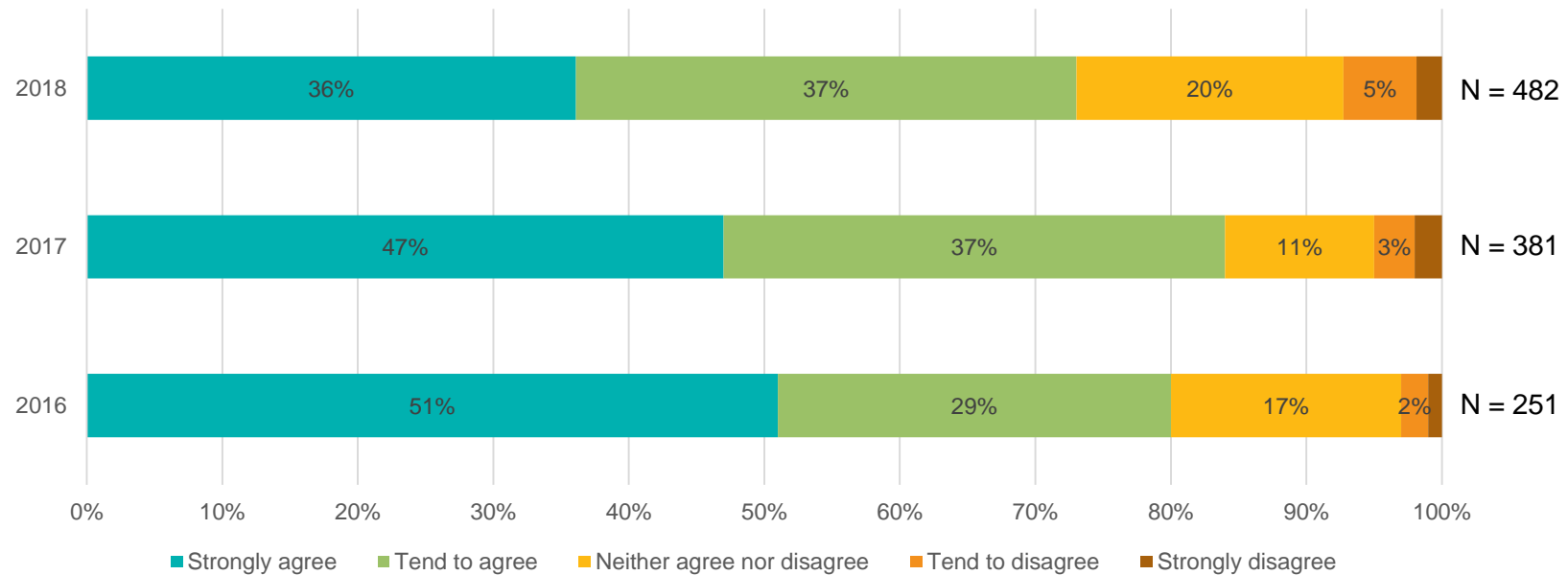
Those who did not visit last year were more likely to rate the event space/location as good or excellent compared to those who did (92% vs. 78%)



Perceptions of the Christmas Village

36% 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

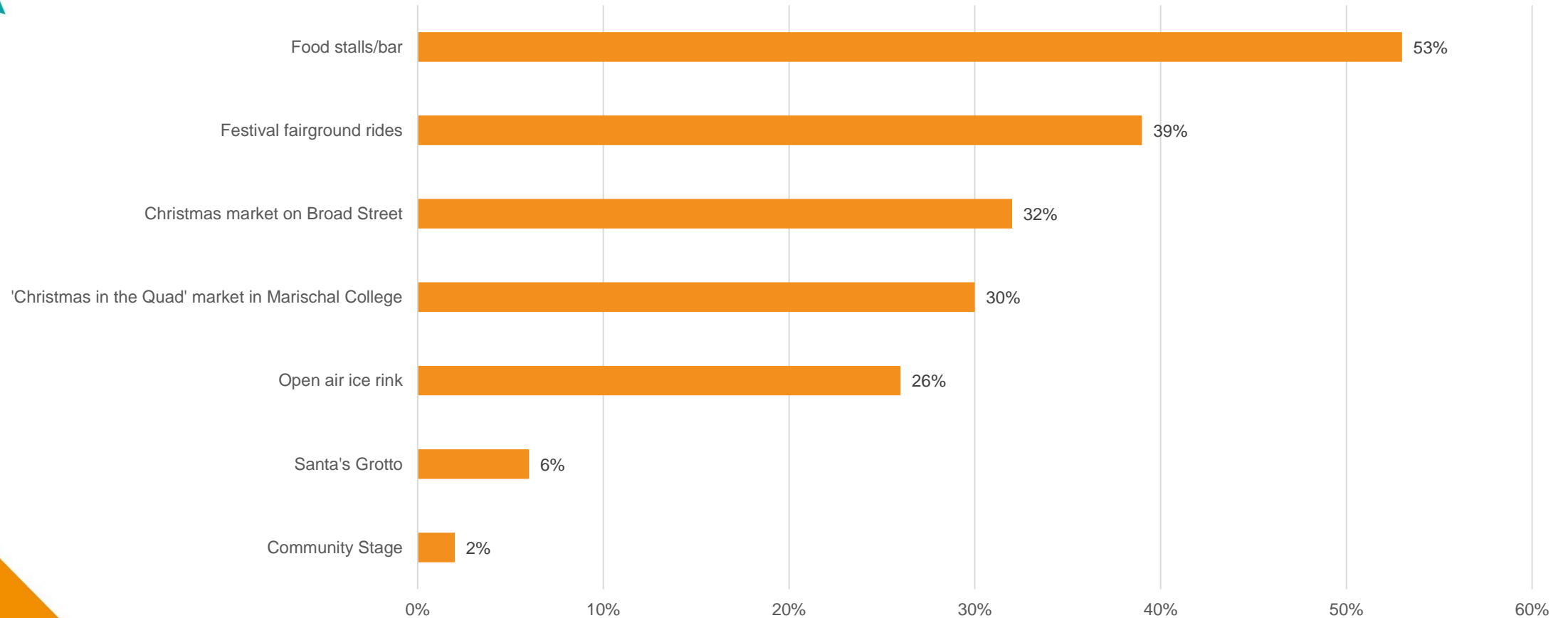


24% of North-east residents strongly agreed that the Christmas Village increased their pride in Aberdeen



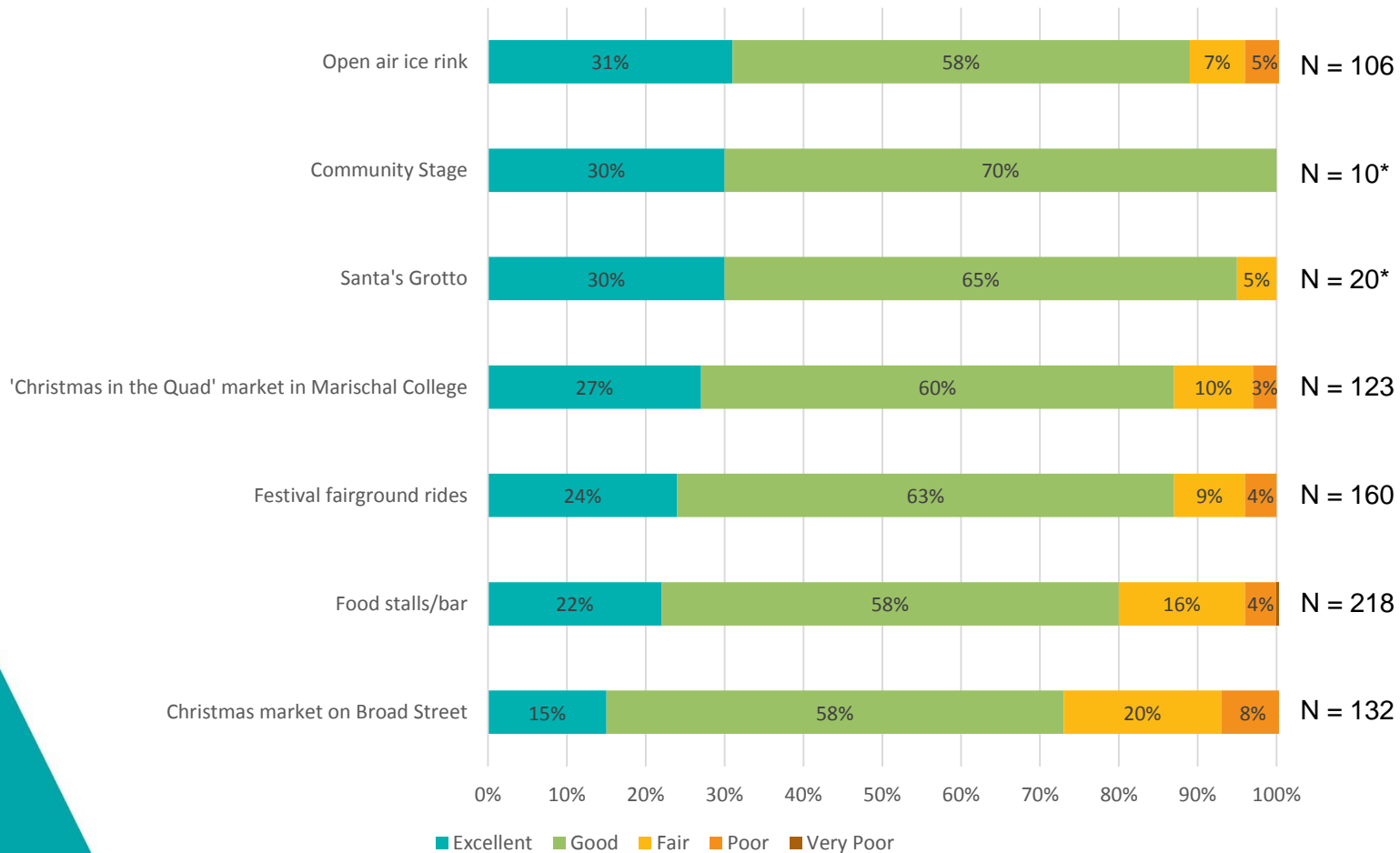
Christmas Village attractions

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



Rating of attractions

How would you rate the following:



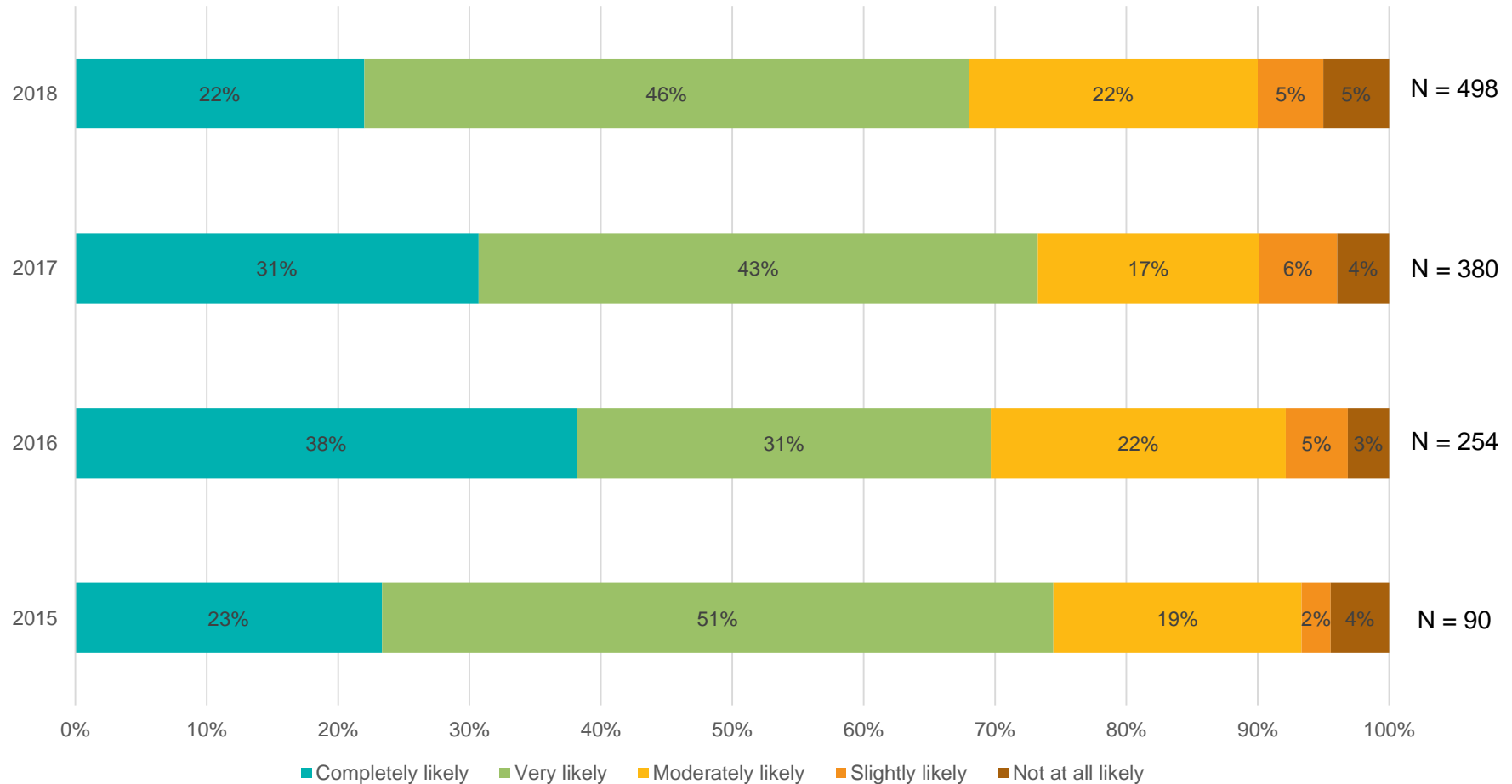
31% rated the Open air ice rink as 'Excellent'

87% rated the 'Christmas in the Quad' market in Marischal College as 'Good' or 'Excellent'

**Please note that some caution should be taken when interpreting and utilising these results due to the small sample sizes*

Advocacy for the Christmas Village

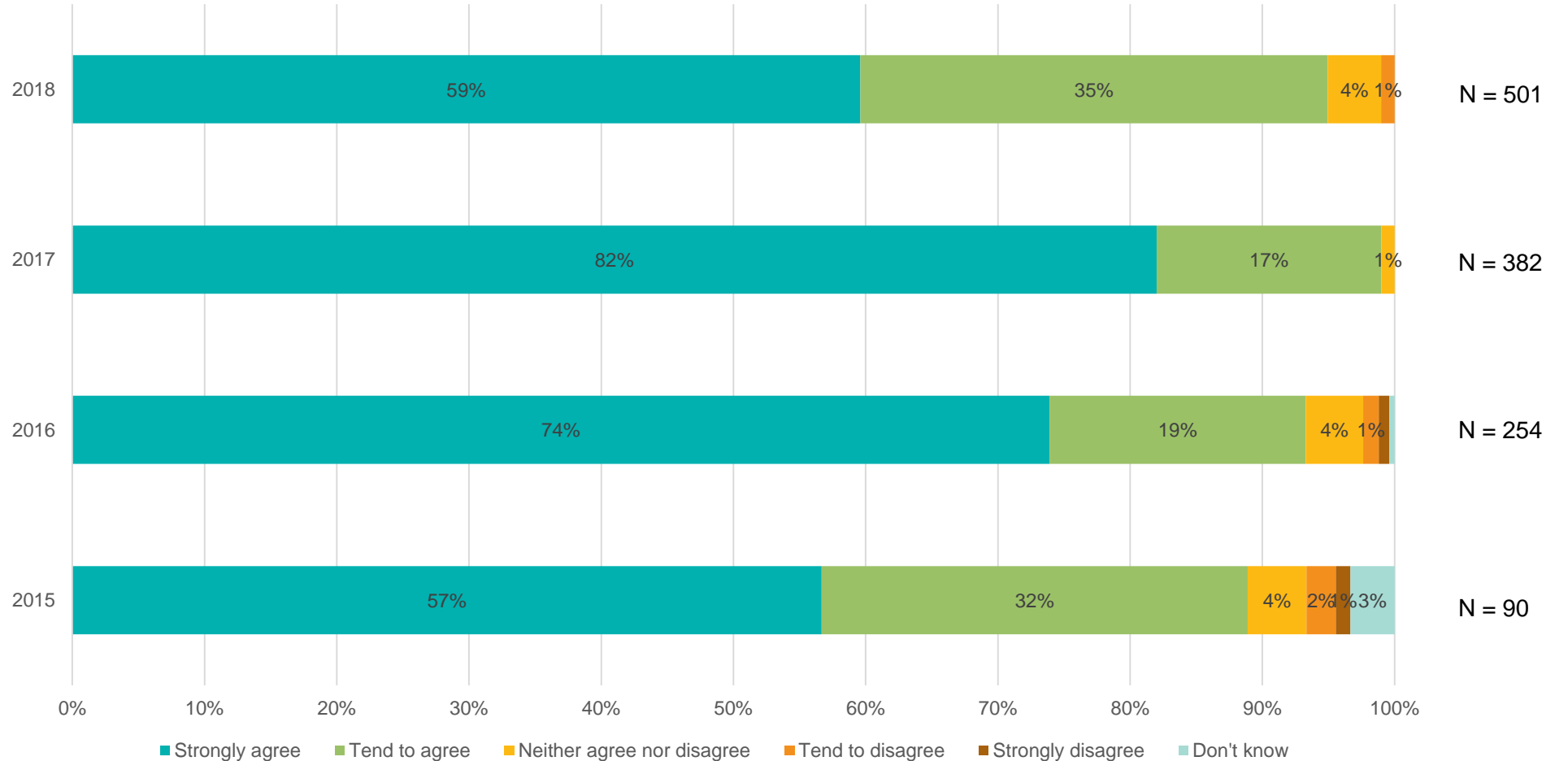
How likely are you to recommend friends and family to visit the Christmas Village in the future?



Advocacy for the Christmas Village

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

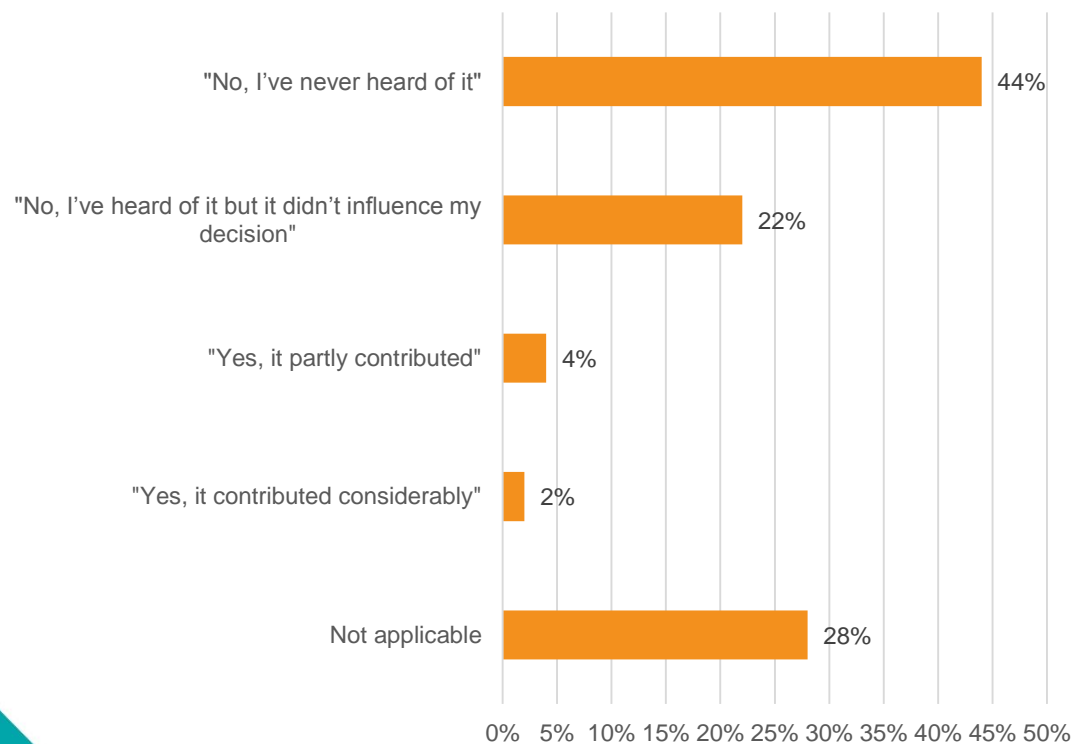
94% of visitors strongly agree or tend to agree that that they would like the Christmas Village to be repeated next year



Alive After Five

This year, we also asked about the new 'Alive After Five' free car parking initiative. In total 44% of respondents had not heard of the initiative, or 61% excluding 'not applicable' responses

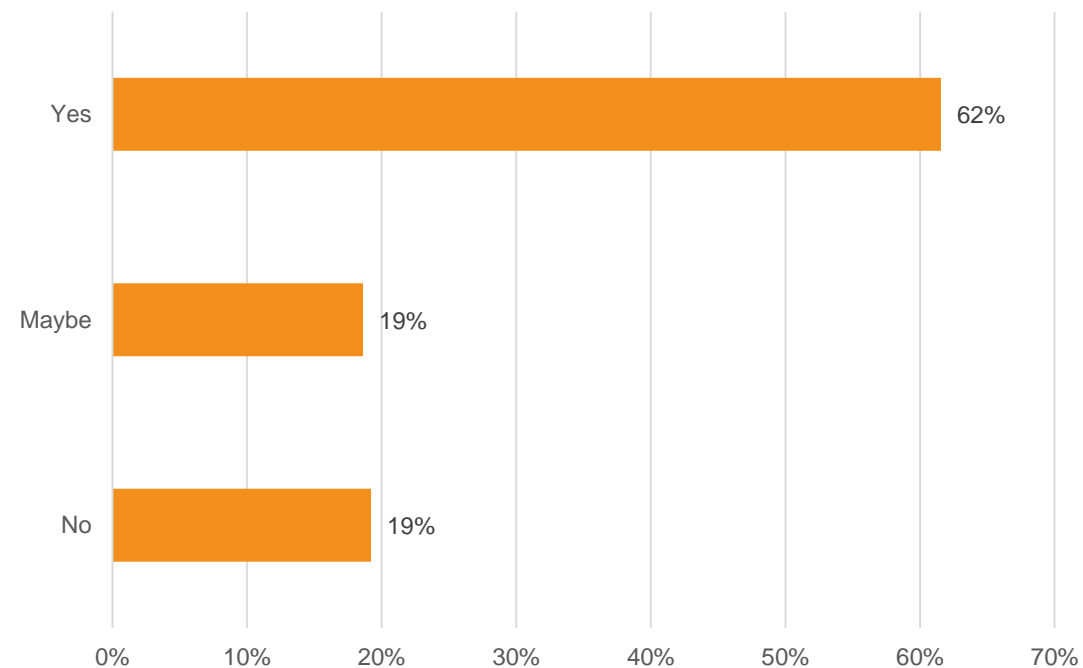
Did 'Alive After Five' have any influence on your decision to come into the City Centre today?



N = 497

Do you think the Alive After Five initiative will increase the likelihood of you visiting the City Centre after 5pm in the future?

(excluding 'not applicable' respondents)



N = 333



Gross spend per head

1. Surveyed visitors on
 - a. Spend using various categories
 - b. Reason for visit
 - c. Resident location
2. Used reported footfall data i.e. number of visitors

| | 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) 2018 | £9.53 | £1.13 | £9.02 | £14.36 | £0.75 | £34.79 |
| 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

– Based on footfall of 631,000 (Unadjusted)

| | 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 | 6,012,008 | 711,294 | 5,692,087 | 9,064,159 | 472,195 | 23,181,826 |
| Net economic impact after removing 'deadweight' ¹ | 3,057,484 | 361,738 | 2,894,784 | 4,609,695 | 240,141 | 11,142,131 |
| Net additional to region ² | 238,261 | 134,717 | 274,749 | 671,770 | 30,689 | 1,350,186 |

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. £1,350,186 was from people not from Aberdeen or Aberdeenshire.

3. All excludes multiplier analysis

Notes:

- i. The analysis is reliant on footfall data provided by Aberdeen Inspired (estimated at 631,000). AI commissioned Springboard to gather the footfall figures using the same method as in 2017. Springboard counts are estimated using Wifi signal counts and a multiplier (i.e. 1.8) which is based on manual counts during 4 sample periods. Please note this is likely to count visitors to Marischal College, etc. who were not necessarily in the area for the Christmas Village and so this may be an overestimation.
- 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

– Based on footfall of 574,128 (Adjusted)

| | 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 | 5,470,146 | 647,185 | 5,179,059 | 8,247,207 | 429,636 | 21,092,449 |
| Net economic impact after removing 'deadweight'¹ | 2,781,913 | 329,134 | 2,633,877 | 4,194,224 | 218,497 | 10,137,891 |
| Net additional to region² | 216,787 | 122,575 | 249,986 | 611,224 | 27,923 | 1,228,493 |

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. £1,228,493 was from people not from Aberdeen or Aberdeenshire.
3. All excludes multiplier analysis

Notes:

- The footfall figures have been adjusted in this scenario from 631,000 to 574,128 to account for individuals who may have been in the area for reasons other than the Christmas Village (e.g. to visit Marischal College or Marischal Square)**
- This adjustment is based on average footfall on Broad Street between April 2017 and January 2018. This assumes a footfall of 31,621 over a typical five-week period irrespective of the Christmas Village being open, we have then applied the same multiplier as used by Springboard (i.e. 1.8).*
- 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)
- 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

**This adjustment has been based on historic footfall data for the period stated, however we can revise these figures if updated footfall data is available.*



Economic Impact

– Adjusted vs. unadjusted scenarios

- As the economic impact is dependent on visitor numbers, we recommend using an adjusted estimate of footfall (i.e. an adjustment has been applied due to total counts potentially including individuals in the area for other purposes, e.g. to attend Marischal College, work in the vicinity, etc.)
- The table below estimates the economic impact based on the total footfall figure as well as the adjusted footfall figure to demonstrate the potential impact of this range of visitor numbers.

| | 631,000 visitors (Unadjusted footfall) | 574,128 visitors (Adjusted footfall) |
|---|---|---|
| Total gross economic impact | 23,181,826 | 21,092,449 |
| Total net economic impact after removing 'deadweight' | 11,142,131 | 10,137,891 |
| Total net additional to region | 1,350,186 | 1,228,493 |

- Based on the assumption that there would typically be significant footfall numbers in the festival location in a standard 5-week period (i.e. when the Christmas Village is not on), we advise that the footfall figure is adjusted to 574,128 to account for this. Please note that this is a best estimate based on data available.
- *Please note that even if the Christmas Village was assumed to have had a lower footfall, the festival would still have been found to have had a significant impact. To illustrate, using Springboard's visitor count prior to their multiplier being applied (i.e. count of 350,581), this would result in a total gross economic impact of £12.9m, a net impact of £6.2m after removing deadweight, and a net additional of £0.8m to the region.*



Looking forward

- What else, if anything, would you like to see at the Christmas Village in the future?
 - *“More food variety, no vegan or vegetarian options available”*
 - *“More activities for younger children”*
 - *“Nothing! It's great”*
 - *“A little reduction in prices”*
 - *“Make it bigger, needs more atmosphere”*
 - *“More stalls and more variety”*
 - *“Union Terrace is better location, miss the maze”*

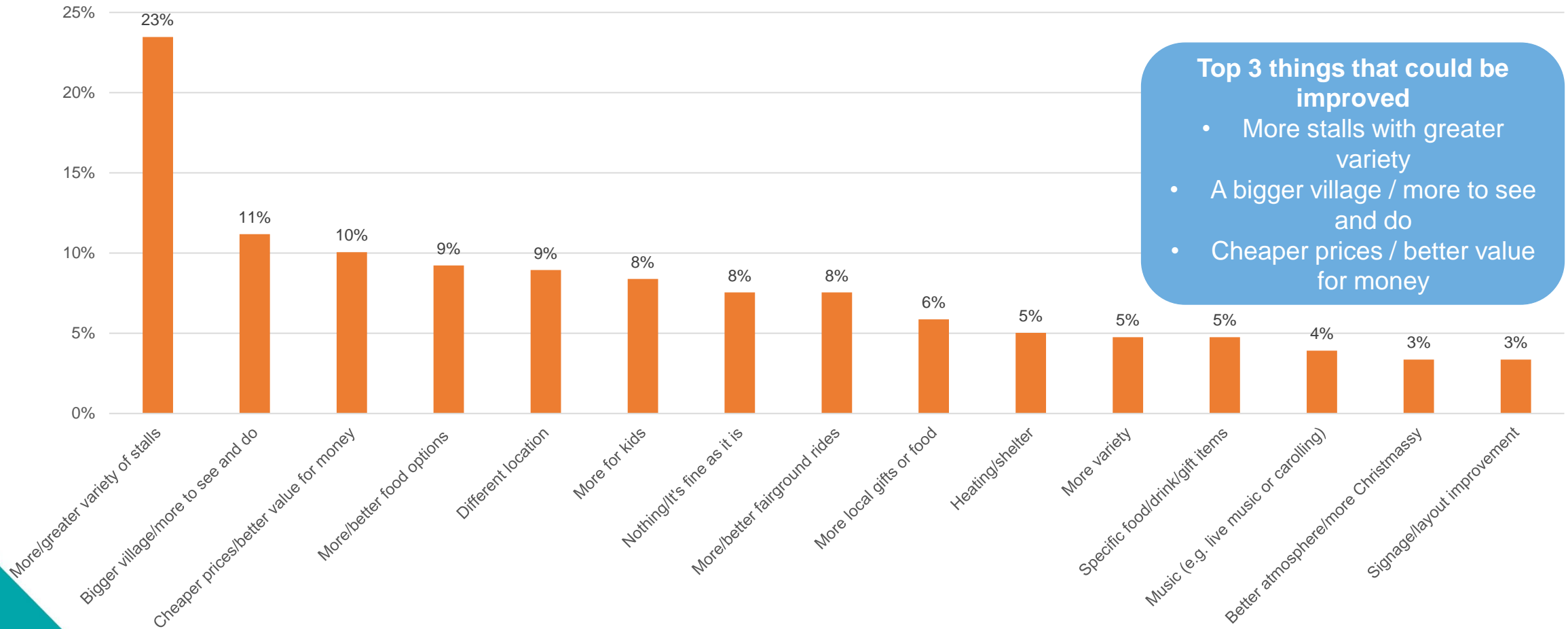
Most frequently used words

“More” *“Stalls”*
“Food” *“Bigger”*
“Rides” *“Better”*
“Union” *“Variety”*



Looking forward

What else (if anything) would you like to see at this Christmas Village in the future?



Top 3 things that could be improved

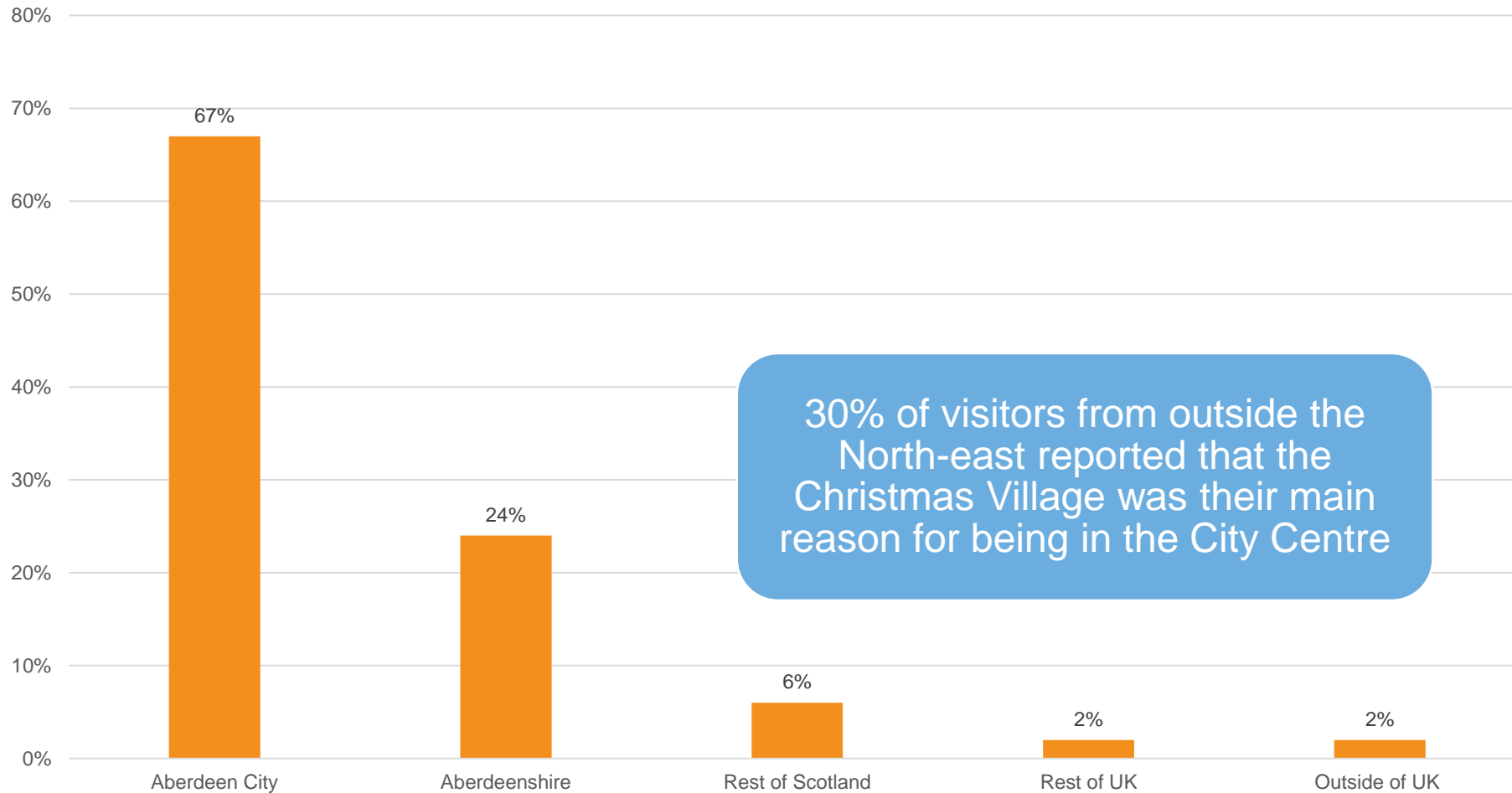
- More stalls with greater variety
- A bigger village / more to see and do
- Cheaper prices / better value for money



*Open-ended responses were coded and those mentioned by at least 12 respondents have been included

Visitor Demographics

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



30% of visitors from outside the North-east reported that the Christmas Village was their main reason for being in the City Centre

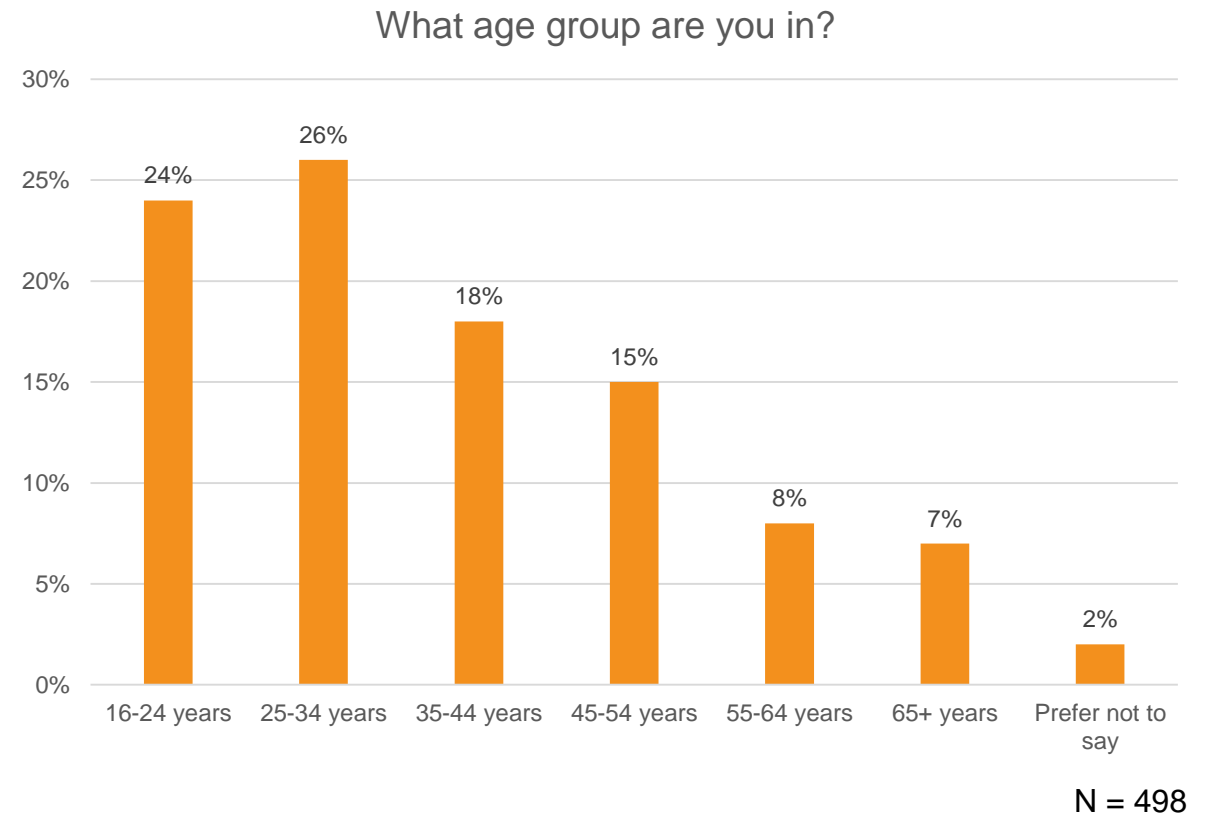
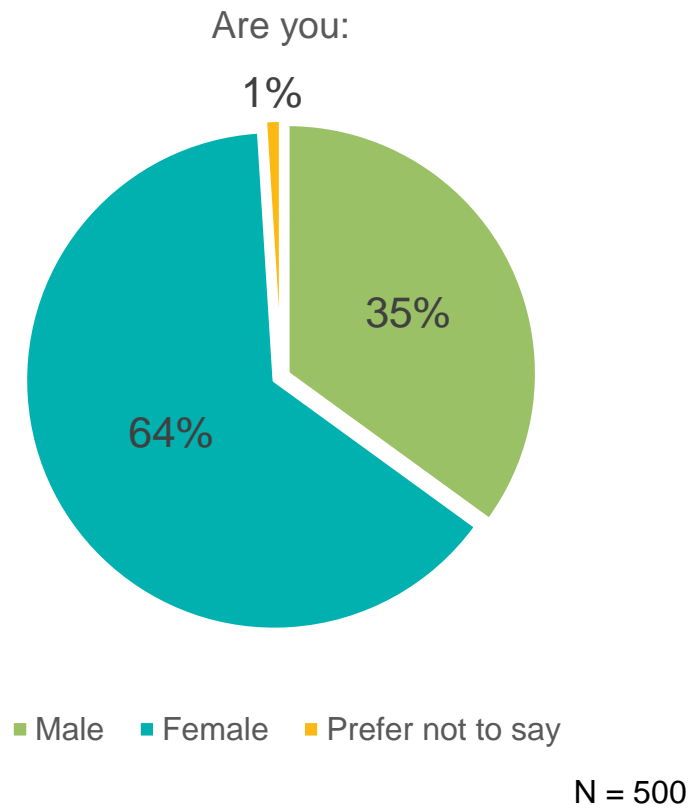
Outside of UK :

- America
- Canada
- Germany
- Netherlands
- Norway
- Poland
- Spain

N = 499



Visitor Demographics

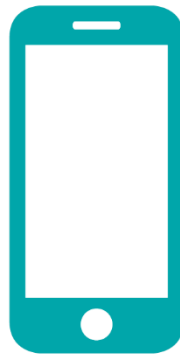


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