

## CITY BREAKS RESEARCH

### Executive Summary

“**City breaks**” are defined as short breaks (including at least one overnight stay), where the visitor spends the majority of their time in a city.

VisitScotland commissioned a few research projects in the previous years, to find out more about UK consumers who take city breaks (in Scotland). Six cities are currently promoted as city break destinations in Scotland: Edinburgh, Glasgow, Aberdeen, Stirling, Dundee and Inverness.



### City breaks in general

The internet has revolutionised the **planning and booking of city breaks**. The growth of the internet has enabled consumers to be more spontaneous, to tailor-make their city break to meet their needs and to quickly share information and ideas on potential city breaks with friends. The internet is now the preferred method for city break planning and booking. However, the consumer also has distinct associations for the various websites they consult when planning and booking city breaks. Tourism websites, such as [visitscotland.com/citybreaks](http://visitscotland.com/citybreaks), are clearly associated with the inspiration and planning stage, whereas “deal-based” websites (e.g. [lastminute.com](http://lastminute.com)) are more associated with the booking stages, where accommodation and transportation is sourced and confirmed. Consumers feel reassured by consulting a wide range of websites. Each website in their repertoire is perceived to have its own core competency. Not one single website currently fulfils their entire city break planning and booking needs. However, the [visitscotland.com/citybreaks](http://visitscotland.com/citybreaks) website could still develop functionality and content more strongly associated with other websites, and help encourage more people to book via the site.

In terms of planning, consumers tend to book their city break around a month or two in advance. However for a smaller proportion it can be a very spontaneous decision, which may be made less than a week before the break.

From a consumer perspective, the **ingredients that make up a city** are often different from the state rationale for giving a place a city status. The consumers expect of a city:

- Choice of accommodation to suit a range of budgets
- Unique energy and culture
- Plenty of distraction to fill a weekend: activities, events, sights
- Ability to walk around the city centre and use public transport
- Unusual shopping, with offers different to home, but also access to same/similar shops

Where any of these ingredients are missing, consumers’ expectations of a valid city break destination will not be fulfilled.

### City breaks in Scotland – Target audience

In line with VisitScotland’s segmentation research, two segments have been identified as target audiences for Scottish city breaks: Cold 1 (primarily for Edinburgh and Glasgow) and

Cold 5 for all cities. Please find more information on these segments and the segmentation research by clicking on the link below:

[http://www.visitscotland.org/research\\_and\\_statistics/leisure\\_visitors/profiles/uk\\_ireland\\_profiles/uk\\_target\\_markets.htm](http://www.visitscotland.org/research_and_statistics/leisure_visitors/profiles/uk_ireland_profiles/uk_target_markets.htm)

VisitScotland promotes Edinburgh and Glasgow as city based destinations, i.e. where a visitor spends the majority of their time in the city. The other four, smaller cities (Aberdeen, Inverness, Dundee and Stirling) are being promoted as city base destinations, i.e. where a visitor bases him-or herself in a city and explores the surrounding area.

### **Promoting the six Scottish cities**

Out of Scotland's six cities (Edinburgh, Glasgow, Stirling, Inverness, Aberdeen and Dundee), only Edinburgh and to a certain extent Glasgow stand out spontaneously as city break destinations.

Glasgow is becoming increasingly well known as a shopping destination and for its vibrant nightlife, especially among the younger audience. The smaller cities are less well known outside Scotland, and as such, unlikely to form part of the consumer's immediate consideration set. When prompted, consumers show they are open to visiting these cities. Therefore, there is a role to educate consumers about what these "secondary" cities have to offer in terms of activities.

The **four smaller cities Stirling, Dundee, Aberdeen and Inverness** face heavy competition from other Scottish cities, other Scottish destinations like Skye, Mull, Perth, the Borders etc and other city break destinations within the UK and Europe. Cities like Amsterdam, Prague, Barcelona or London are recognised city break destinations with a guarantee for time well spent. For the consumer, they are a safe bet and their reputation is often supported by a positive "buzz" surrounding them, which includes Word of Mouth recommendations and extensive coverage in the media.

#### **Dundee**

Dundee faces a difficult challenge to attracting overnight visitors. Among the Scottish audience, some negative perceptions have to be overcome, whilst the English audience in general has a low awareness of Dundee. Key to bringing in visitors are upbeat but realistic communications of what Dundee has to offer, combined with a time frame to prompt action. This could be special deals tied in with events, or special packages like golf and spa. Specialist interest audiences like maritime philes could also be targeted successfully.

#### **Aberdeen**

Aberdeen is not yet top of mind as a tourist destination. Visiting friends or family, work or study reasons currently tend to fuel the desire to visit Aberdeen. However, its northern positioning (long summer nights, Northern lights) and the surrounding area with beaches and coastline hold great appeal. Combined with Aberdeen's reputation for great nightlife, Aberdeen's offering is particularly relevant to an active younger audience. To manage expectations, there is a need to further invest facilities and infrastructure and to get people to visit when Aberdeen is looking its best. Aberdeen and local surrounds should be communicated together for outward bounds, fishing / cycling / watersports and active nights, or stag and hen nights. Relevant packages include Highland Games, Spring break or Christmas markets.

#### **Stirling**

Stirling's geographic proximity to Glasgow and Edinburgh brings benefits and drawbacks. While it is very accessible for a day trip from both cities, it is struggling to compete with Glasgow and Edinburgh for (English) overnight visitors. The city also suffers from a perception that it falls short of its city status, since there is no awareness of great (spa) hotels

and shopping experience. History is fundamental to Stirling's offering, but needs to be brought alive for those with less interest in this subject. Events might have the biggest draw (e.g. festivals or concerts in the best historical surroundings), and hotel packages might prompt overnight stays.

### **Inverness**

Inverness enjoys an unique position as a Scottish city which benefits from being remote and different for both Scottish and English audiences. It is too far away for a day trip, and there's so much to do that even a weekend trip is not long enough. The beauty of the surrounding area is renowned and indisputable, whilst the city itself offers all facilities desired from a city break destination. Inverness is fortunate that it encapsulates a wealth of values: nostalgia and tradition with its history, mythical with Nessie, emotional with the opportunity to see dolphins and ethical in the sense that the air is pure and the hospitality is unsurpassable. Inverness can attract visitors without the need for specific events or triggers. It is important to keep the "buzz" around Inverness alive through continued PR and advertising, supported by promotional deals and breaks.

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