

Angus Visitor Survey

Findings from July 2016 to June 2017



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Background

Tourism is a key sector of the economy in Angus. The destination offers a wide range of tourism products, including golf, coastline and beaches, town centres and individual attractions as well as the natural landscape and scenery of the Angus Glens.

A key objective of Angus Council is to shape and develop the area's tourism offer to ensure sustainable tourism growth via the delivery of high quality and authentic experiences to visitors to the area. In addition, the Council wants to better understand target visitor markets to create marketing campaigns that reach consumers in the most effective way and to identify potential gaps and opportunities in growing tourism.

In order to assist in the development of Angus as a visitor destination and to enable local tourism businesses to grow, Angus Council commissioned STR (formerly LJ Research) to undertake an area-wide visitor survey. The survey enables an understanding of visitor profiles, visitor behaviour and their perceptions of the area as well as an understanding of their purchasing behaviour. The results from this research will help to inform strategies to grow tourism in Angus, including the Council's ambition to increase the economic impact of tourism to Angus from £202 million in 2014 to £220 million by 2020.

This report presents the findings of the Angus Visitor Survey based on the responses of visitors to the area between July 2016 and June 2017.

Methodology

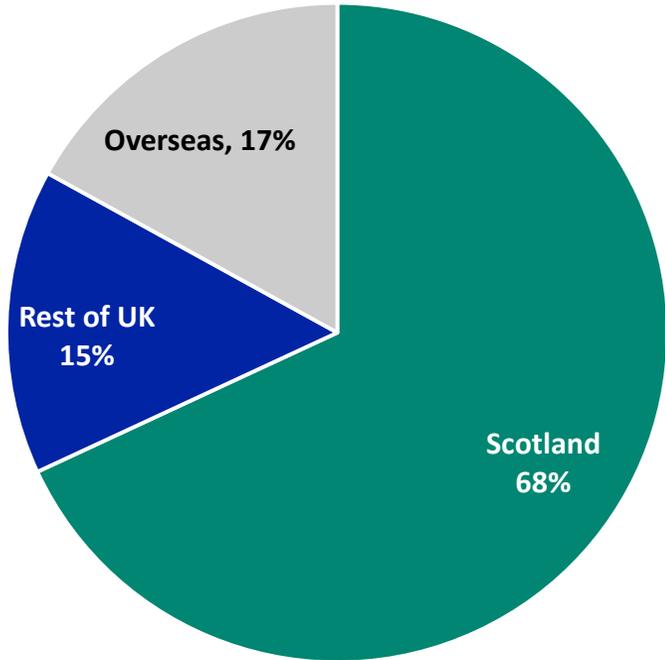
- An online survey approach was undertaken. Email addresses of visitors – with visitors defined as those who were visiting Angus and living outside of the area – were captured by professional interviewers on an ongoing basis between July 2016 and June 2017 across multiple locations in the area.
- Visitors completed the survey after their visit which enables the collection of detailed and accurate information regarding their overall experience in Angus.
- In total, 612 survey responses were achieved which constituted an excellent response rate of 36%.
- The results presented and discussed within this report have been weighted to be fully representative of the audience engaged in the research by our fieldworkers. This control measure ensures that the results presented in this report are reflective of the overall visitor market in Angus.



Visitor Profile: Origin

Nearly 7 out of 10 visitors were from Scotland with a large share travelling to Angus from nearby Perth & Kinross / Dundee (31%) and Fife (11%).

Visitors from the US were the most common overseas group (27%) followed by Australians and Germans (17% and 12%, respectively).



27%



17%

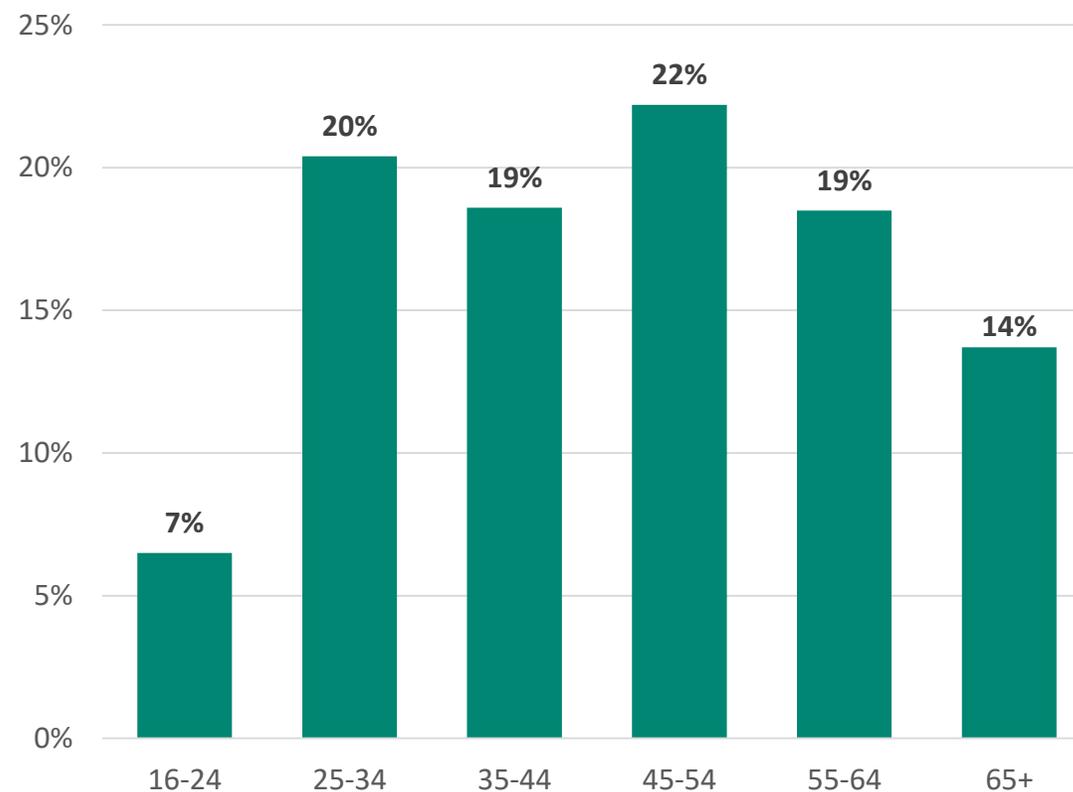
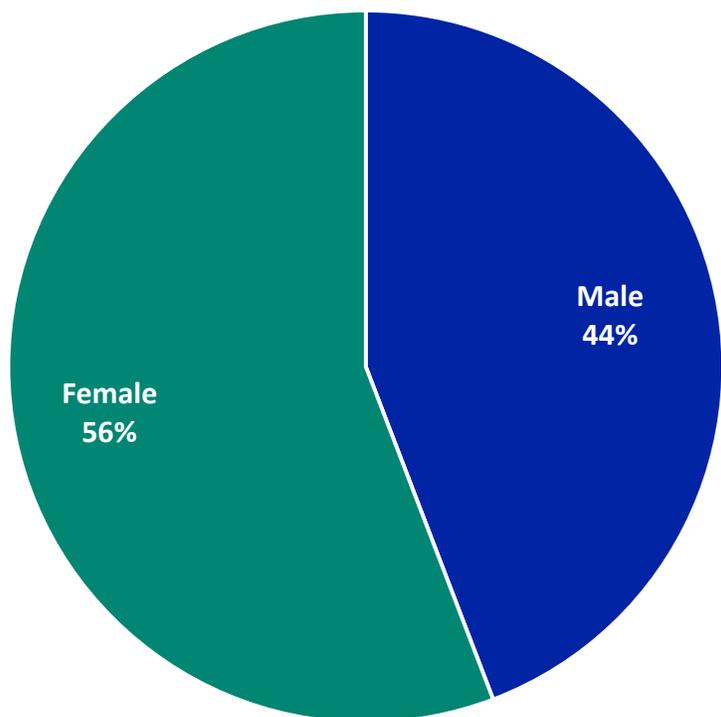


12%

Visitor Profile: Gender & Age Group

As tends to be the trend in destination visitor surveys, female visitors made up the slight majority of visitors (56%).

Those aged 35-54 were a key segment accounting for 41% of the sample.



Visitor Profile: Key Findings

Age Group and Gender

The key market are those aged 35-54. They accounted for 41% of the sample. These visitors commonly come to Angus with children and are more likely to stay in the area overnight.

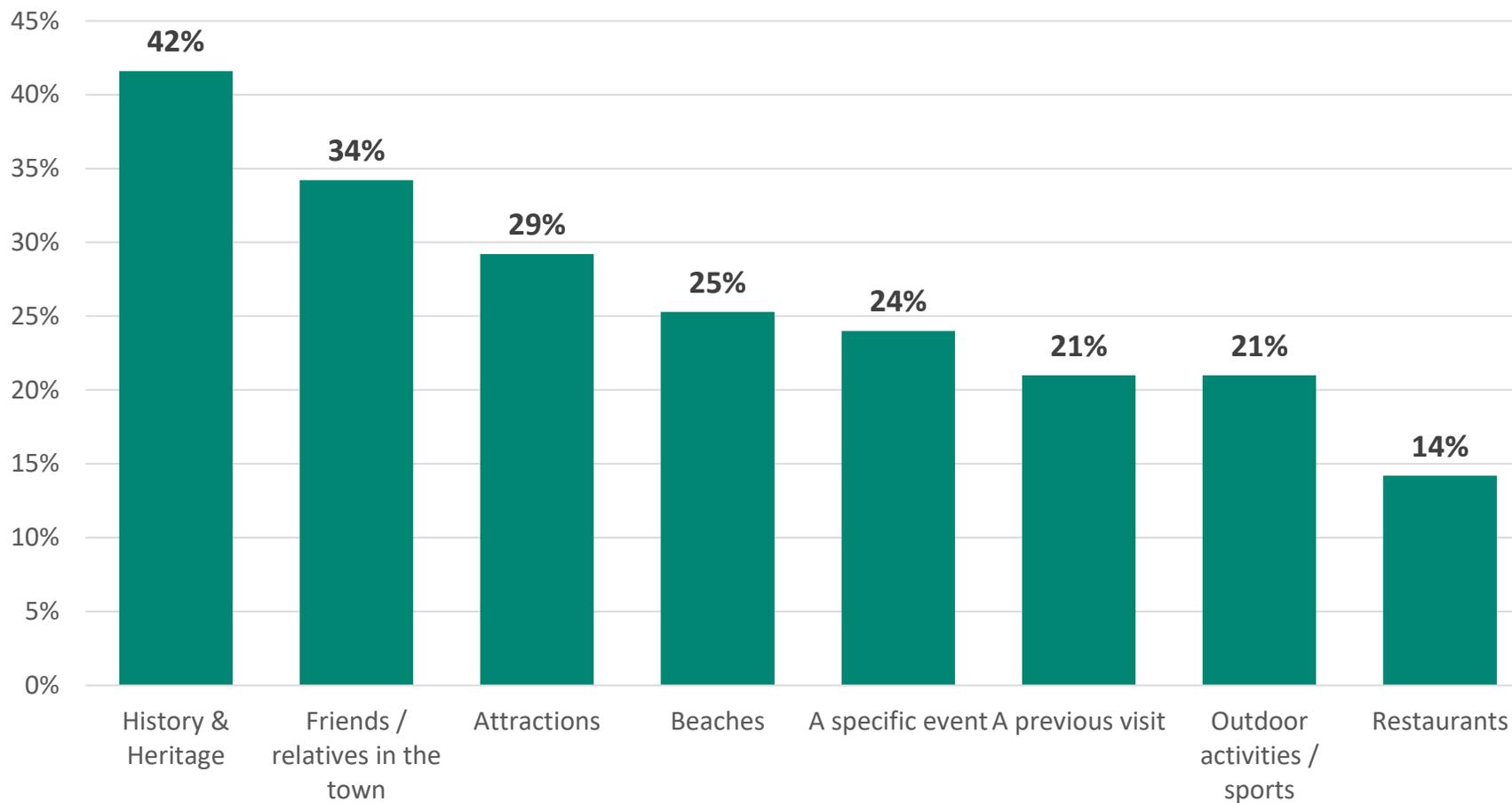
Origin

Angus attracts a mainly local audience with 68% of visitors coming from Scotland. Overseas visitors accounted for 17% of the sample and visitors from the rest of the UK making up the remaining 15%.

Visit Planning: Influencing Factors

History and heritage was the most prominent motivation for visiting, followed by friends and relatives in the area and visitor attractions. Overseas visitors in particular cited history and heritage as a key influence in their decision to visit Angus (75%).

As to be expected, visitors to Glamis Castle also attributed a high level of influence to history and heritage in the decision to visit Angus.



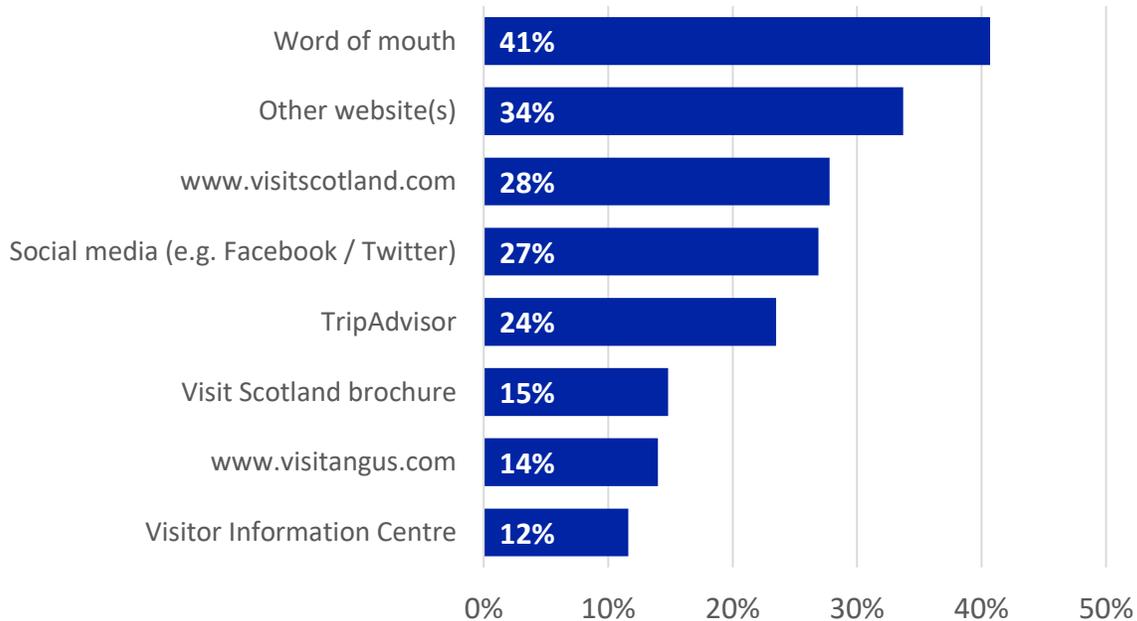
Visit Planning: Information Sources

Most visitors (63%) used at least one information source prior to their visit. The youngest segment (16-34) did the most thorough research (69%) with word of mouth and social media, in particular, being key information channels for this group.

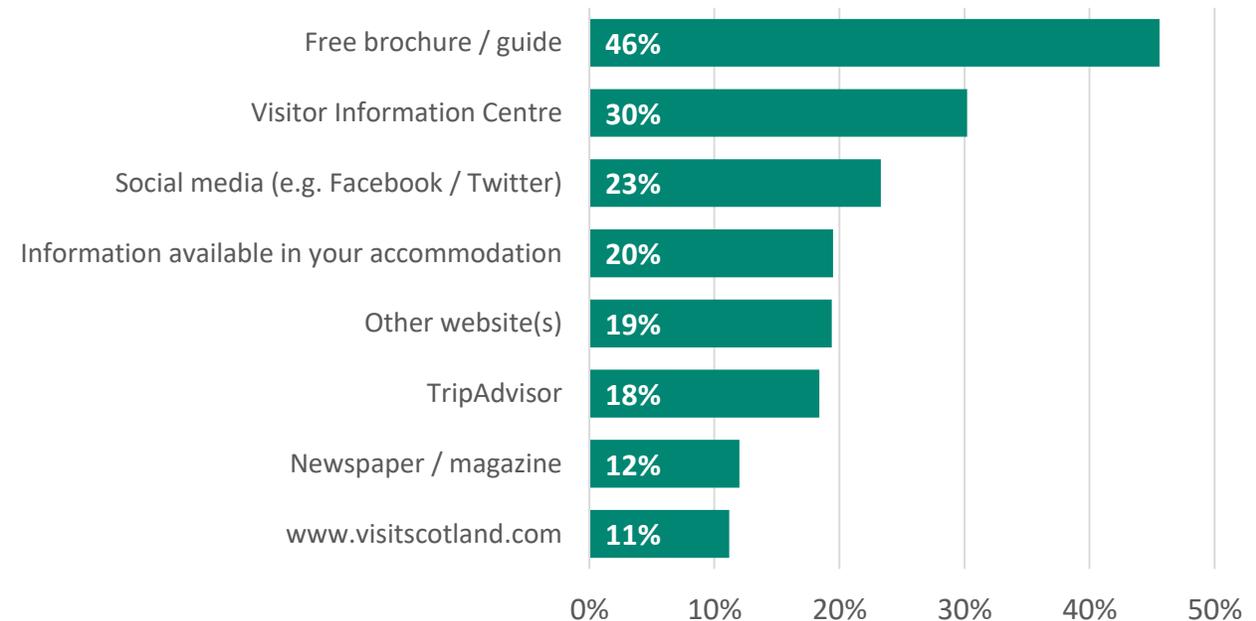
Just over half of visitors used at least one information source during the visit. Day trippers were much less likely than visitors staying away from home to use information during their visit.

Those that visited Glamis Castle accessed the most information sources overall.

Information before



Information during



Visit Planning: Key Findings

Main influencing factors

History and heritage (42%), friends and relatives in the area (34%) as well as attractions (29%) played the key role in the decision making process to visit Angus. The top two factors attracted mainly staying visitors (49% and 42%, respectively). Day trippers, on the other hand, were attracted by a more diverse range of factors including history and heritage (36%), attractions (34%), outdoor sporting activities (28%) and beaches (29%).

Visitors with children were also more likely to be influenced by attractions in the area (40%).

Segments

Five segments were identified based on their visiting motivations and attitudes towards Angus as well as their needs, activities and behaviours. For more information please refer to the final section of this report.

Information sources used before & during visit

Overall, more than half of the visitors used at least one information source before and during their visit (63% and 51%, respectively).

Word of mouth and websites were the most common information sources used prior to the visit. Overseas visitors searched for the most information with nearly 3 out of 4 using at least one source before visiting. They were most likely to go online and browse through the Visit Scotland website (50%) and a range of other websites (39%).

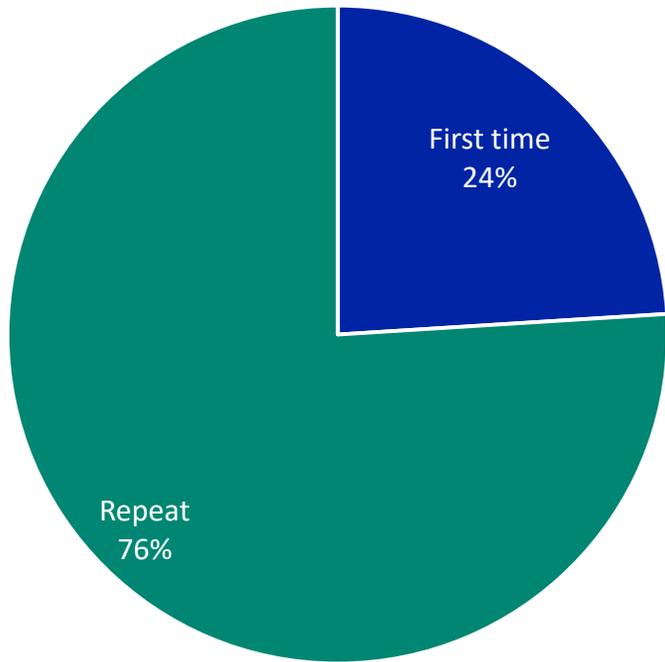
The most popular information sources during the visit was free brochure / guide (46%) and visitor information centres (30%). These two information sources were especially popular among visitors from the rest of UK who used the most information sources overall during their visit.

Visit Characteristics: Visit Frequency

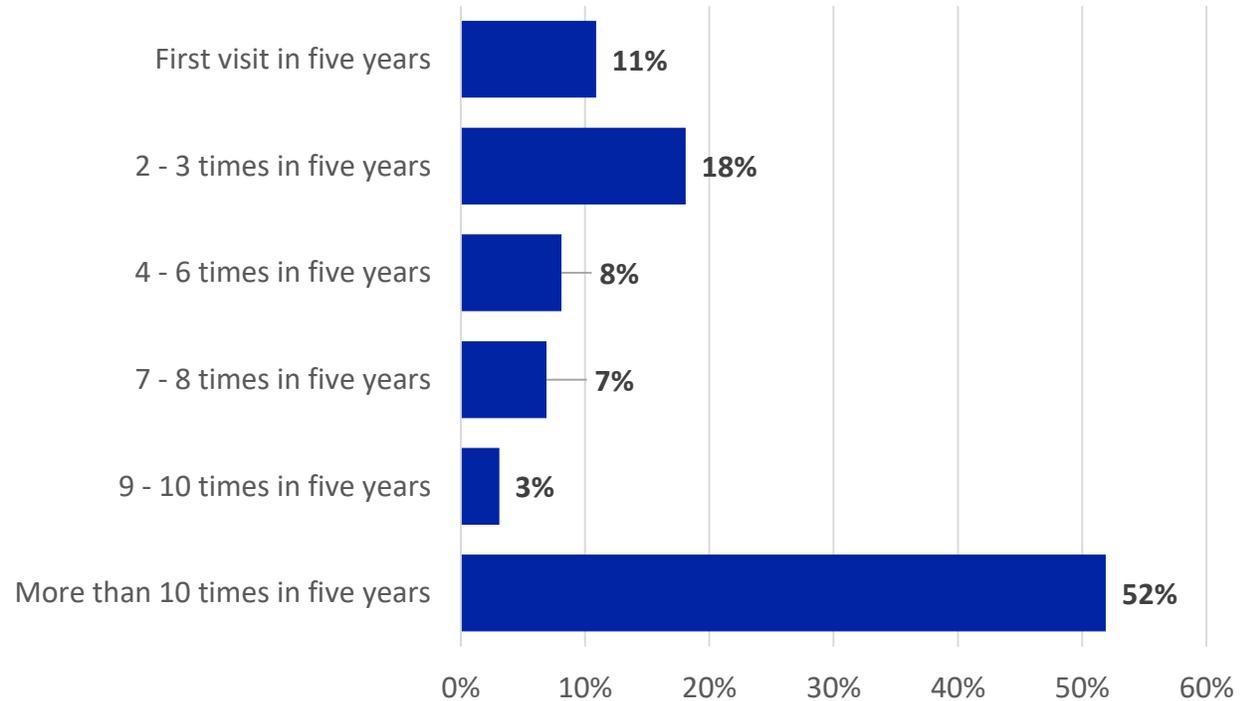
More than 3 out of 4 had visited Angus before.

52% of repeat visitors had been to Angus more than 10 times. The most frequent visitors were mainly Scotland residents on a day trip visiting with kids.

Type of visitor



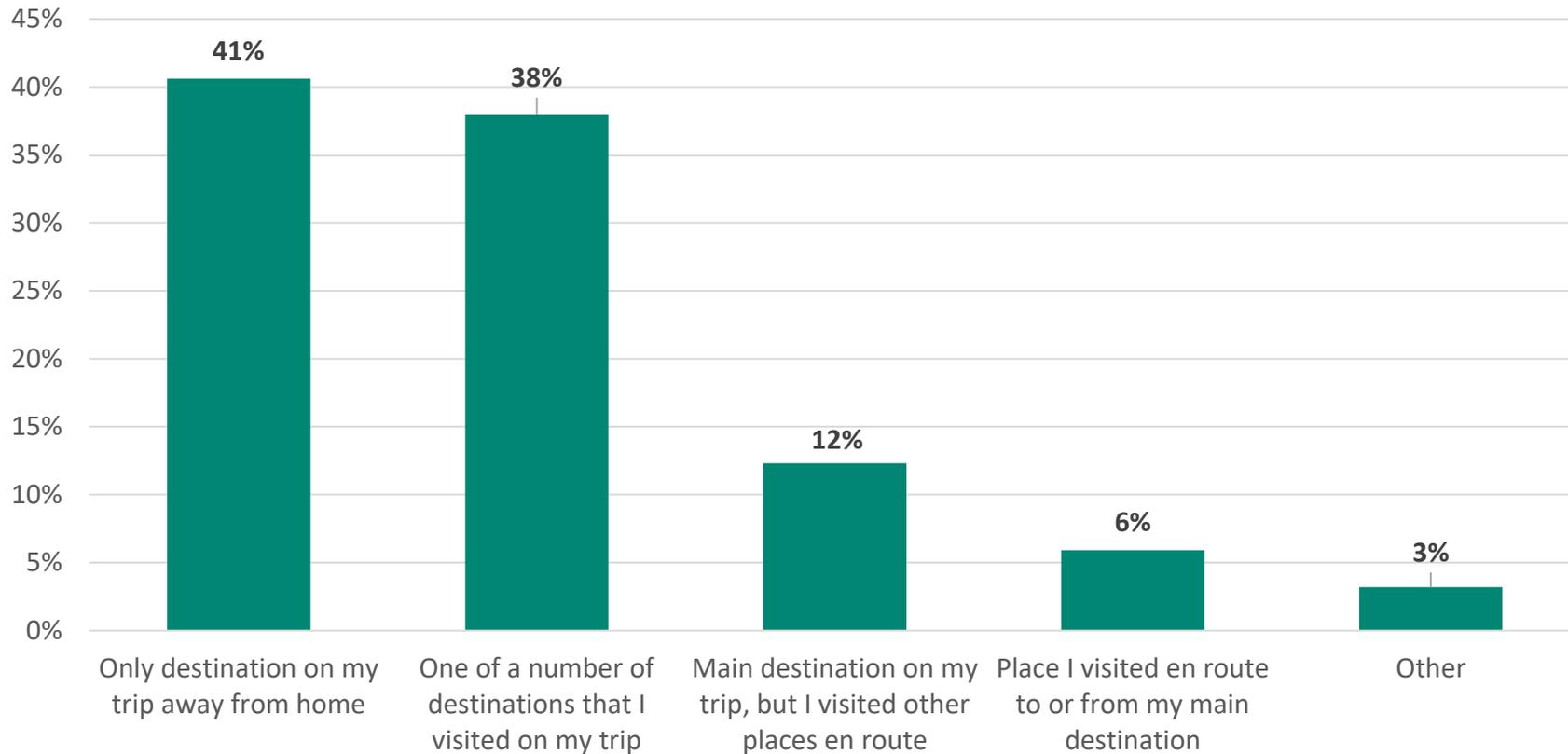
Repeat visitors – visit frequency



Visit Characteristics: Visiting Angus...

Angus was the only or the main destination on the trip among 53% of visitors. This segment was mainly comprised of visitors from Scotland with children.

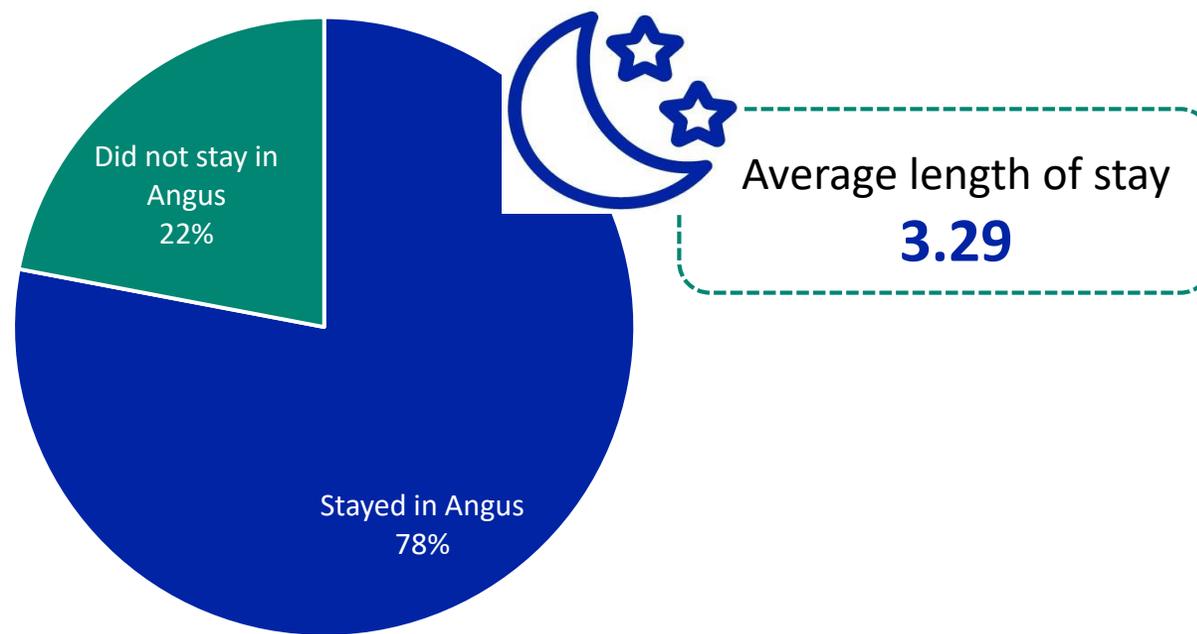
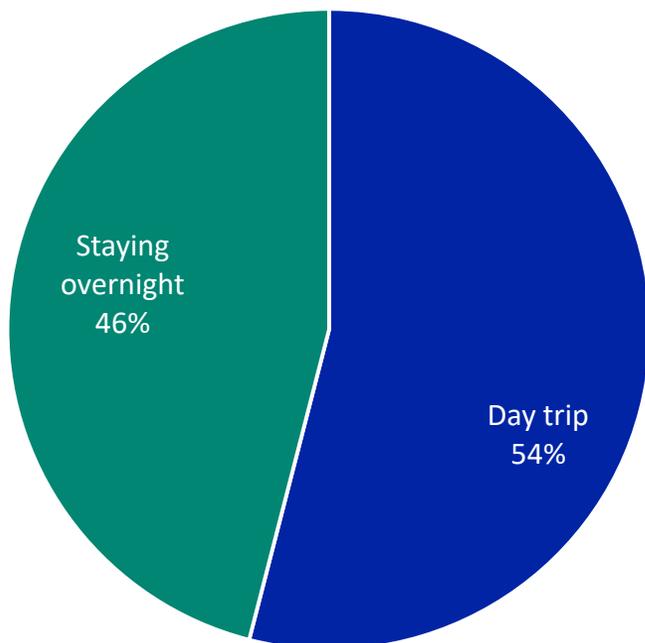
Those who visited Glamis Castle tended to visit Angus as a part of a broader trip.



Visit Characteristics: Staying Visitors

Nearly half of visitors stayed overnight. Just over 3 out of 4 staying visitors spent at least one night in Angus. The overall average length of stay in Angus was 3.29 nights.

Those from the rest of UK, excluding Scotland, were most likely to stay overnight in Angus and they also spent the most nights in Angus (4.46).

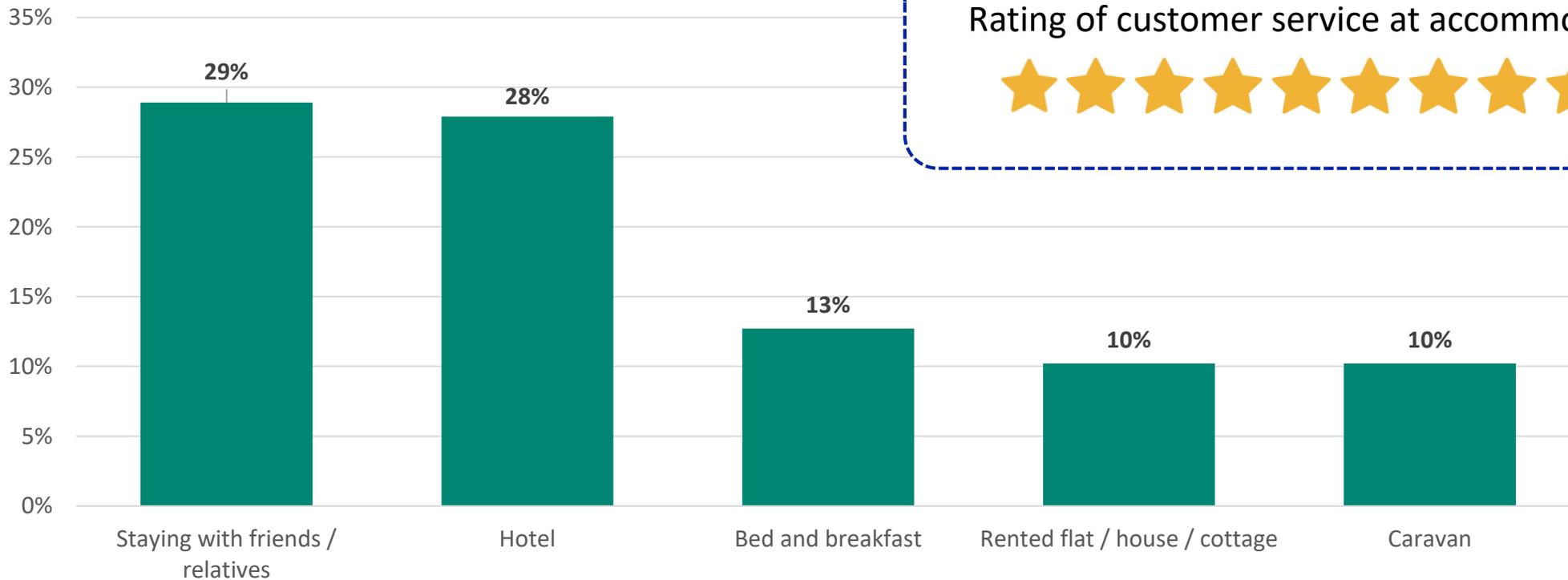


Visit Characteristics: Type of Accommodation Used

Staying with friends and relatives and hotels were the most common forms of accommodation.

Hotels and B&Bs were the preferred options amongst overseas visitors (42% and 33%, respectively) whilst more local audiences tended to stay with friends and relatives.

Staying visitors (excluding those staying with friends and relatives) indicated a very high satisfaction with the customer service provided at their accommodation.

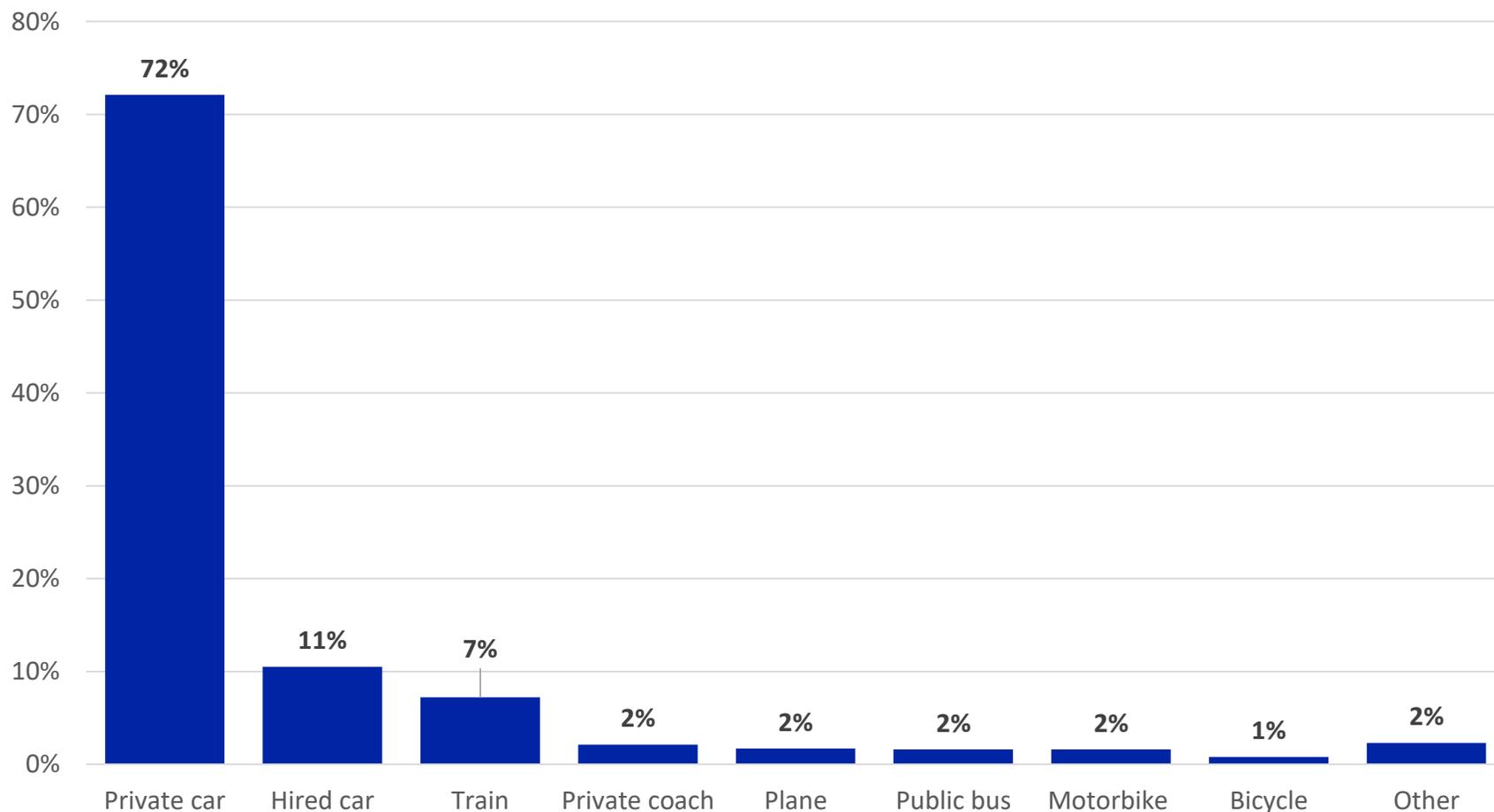


Rating of customer service at accommodation

★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 8.66

Visit Characteristics: Transport

Most visitors arrived to Angus by car (83% did so). Those visiting with children were even more likely to use car to get to Angus (88%). Train was the second most common form of transport to Angus but was only used by 7% of visitors.



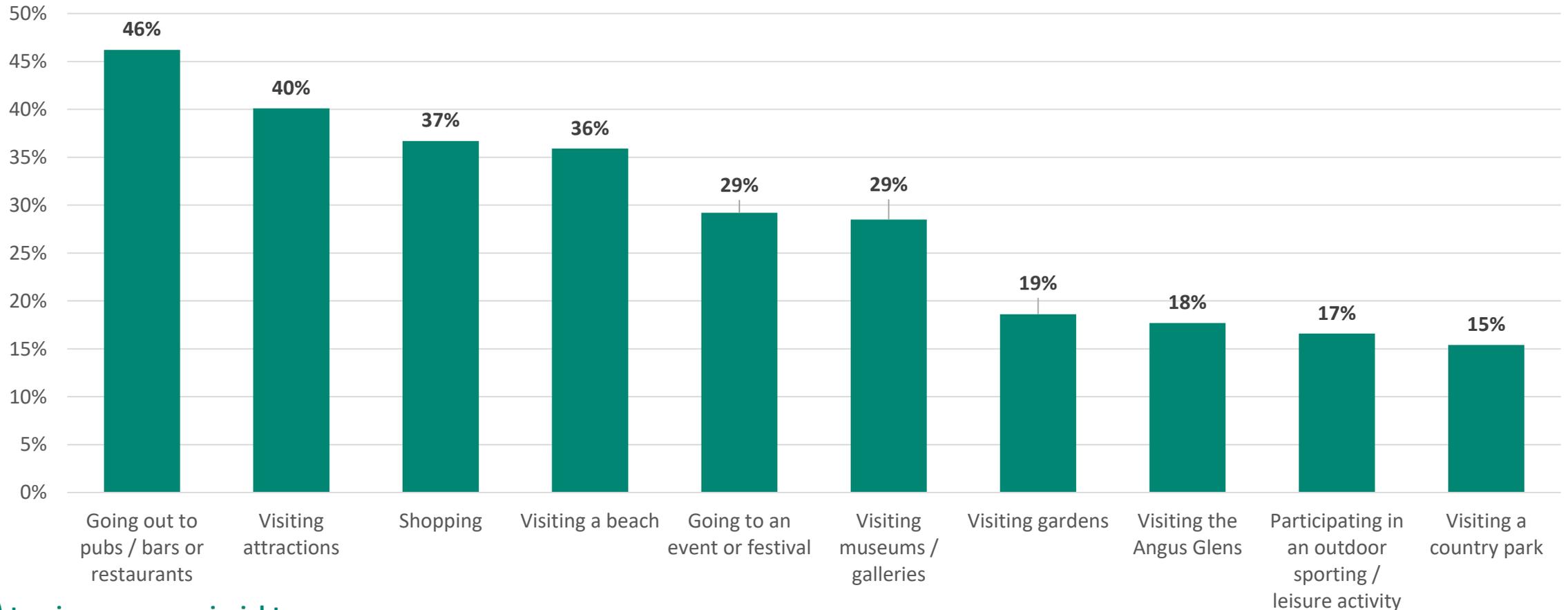
Visit Characteristics: Key Findings

<p>Type of Visitor</p>	<p>Visitors to Angus are commonly on a repeat visit with many of them coming to the area regularly – c. 40% of visitors had visited the area 10 or more times in the last 5 years.</p> <p>First time visitors were a mainly younger audience coming from overseas. They were more likely to visit Glamis Castle.</p>
<p>Type of Trip</p>	<p>Angus was the main or only destination on their trip for 53% of visitors. These visitors were commonly family type visitors.</p> <p>Meanwhile, younger overseas audiences typically visited Angus as a part of a broader trip to Scotland.</p>
<p>Staying in Angus</p>	<p>Just under half of visitors were staying away from home overnight. Of these, more than 3 out of 4 stayed in Angus for an average of 3.29 nights. Scottish visitors had the shortest stay in the area, spending 2.73 nights in Angus on average.</p> <p>Those that decided to stay outside of the area were visiting Angus for the day from their main overnight location (79%) or, less commonly, staying with friends and relatives elsewhere (14%).</p>
<p>Accommodation</p>	<p>In addition to staying with friends and relatives (29%), the most popular accommodation types were hotels (28%) and bed & breakfasts (13%). The top two accommodation types were most popular among younger audiences aged 16-34. Older visitors used a more diverse range of accommodation types.</p>
<p>Transport</p>	<p>Those who arrived by car in to Angus made up the vast majority of visitors (83%). The next most common form of transport to the area was train used by 7% of visitors. Visitors from the rest of UK were more likely to arrive by rail compared to visitors from elsewhere.</p>

Visit Activities: Activities Undertaken

The vast majority (96%) of visitors engaged in at least one type of activity during their visit. Going out to pubs / bars or restaurants and visiting attractions were the two most popular activities.

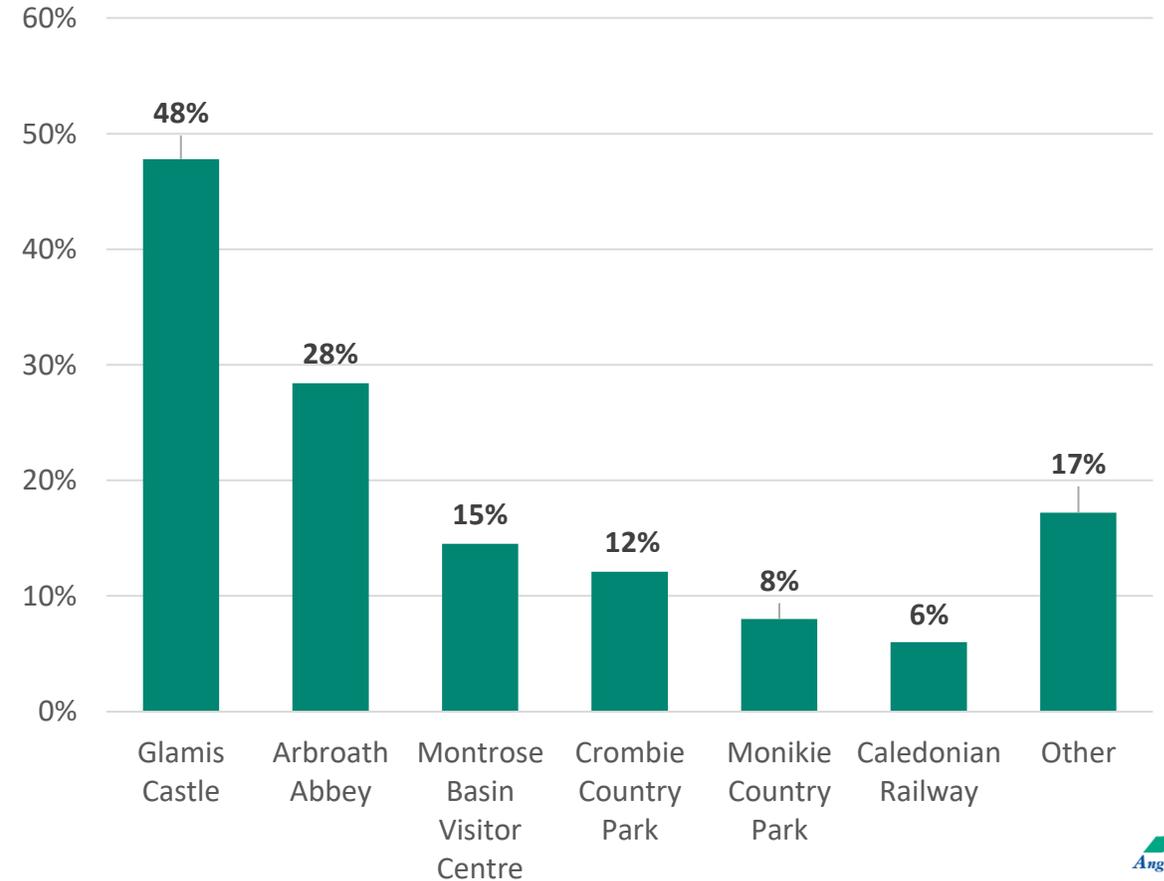
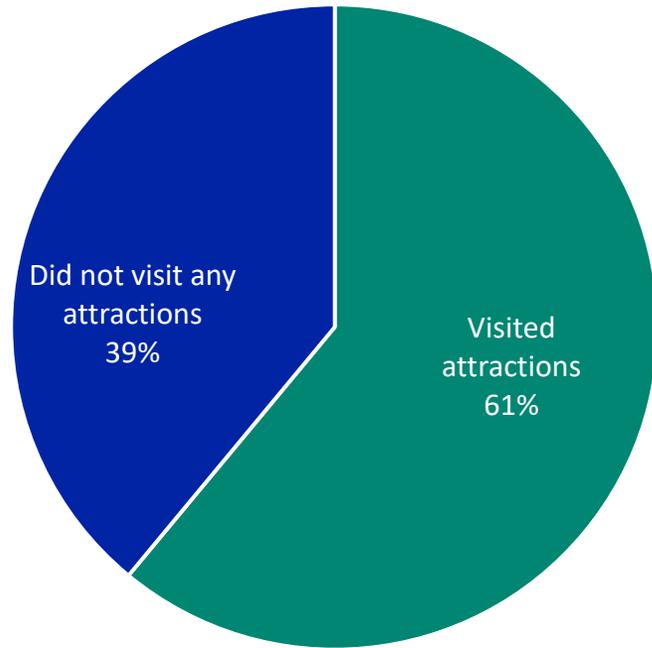
Those who visited Glamis Castle were more likely to visit other visitor attractions too such as museums, galleries or gardens.



Visit Activities: Attractions Visited

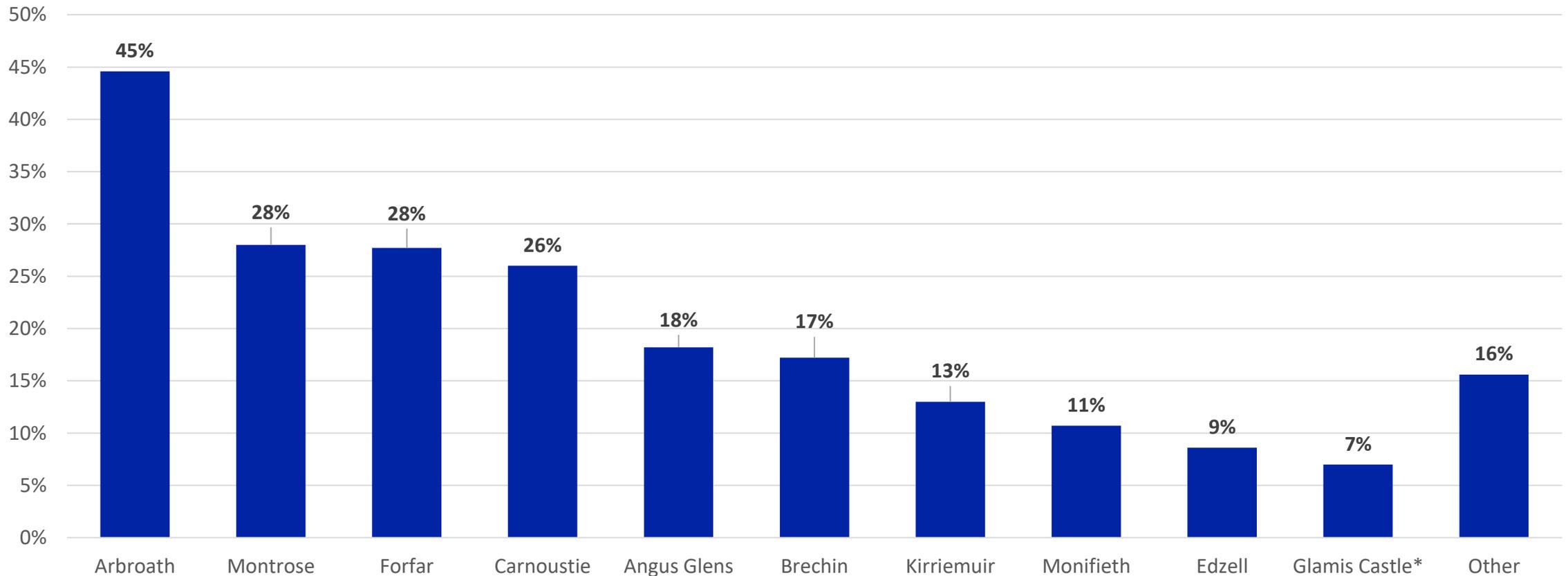
Three out of five people visited at least one attraction during their visit to Angus.

Glamis Castle was the most popular attraction visited by around half of those who went to at least one attraction. These visitors were commonly first time visitors to Angus and from overseas.



Visit Activities: Areas of Angus Visited

Arbroath was the most popular destination in Angus, visited by just under half of visitors. The next most popular places were Montrose, Forfar and Carnoustie.



* denotes derived from Other responses

Visit Activities: Key Findings

<p>Activities undertaken</p>	<p>Nearly all visitors partook in at least one type of activity during their visit.</p> <p>Going out to pubs / bars or restaurants was the most common activity followed by visiting attractions, shopping and going to the beach.</p> <p>Overseas visitors were more likely to visit attractions, museums and galleries. Visitors from the rest of the UK were also more likely than average to visit attractions as well as local pubs and restaurants.</p>
<p>Attractions visited</p>	<p>Glamis Castle was the dominant attraction in Angus. The next most popular attractions were Arbroath Abbey and Montrose Basin Visitor Centre.</p> <p>There were higher levels of visitation of Glamis Castle among visitors without children – these types of visitors also tended to visit more attractions in general. Those visiting with kids were more likely to visit Crombie Country Park – this was second most visited attraction among family type visitors.</p>
<p>Areas within Angus visited</p>	<p>The most popular destination visited was Arbroath followed by Montrose, Forfar and Carnoustie. The first two were especially popular among visitors from the rest of UK. Meanwhile, Forfar was a more popular destination among overseas visitors – this was the second most common location visited among overseas visitors.</p>

Visit Satisfaction: Customer Service

Customer service ratings were above the 8-point threshold, with the only exception being transport in the area, which scored slightly below 8 out of 10. These scores indicate a fairly high level of overall visitor satisfaction.

Overseas visitors generally showed higher customer service satisfaction levels compared to domestic visitors.



Visit Satisfaction: Information Sources

Angus provides a high standard of information to its visitors as both determining factors, sign-posting of key attractions and facilities and visitor information overall, were rated above the 8-point threshold.

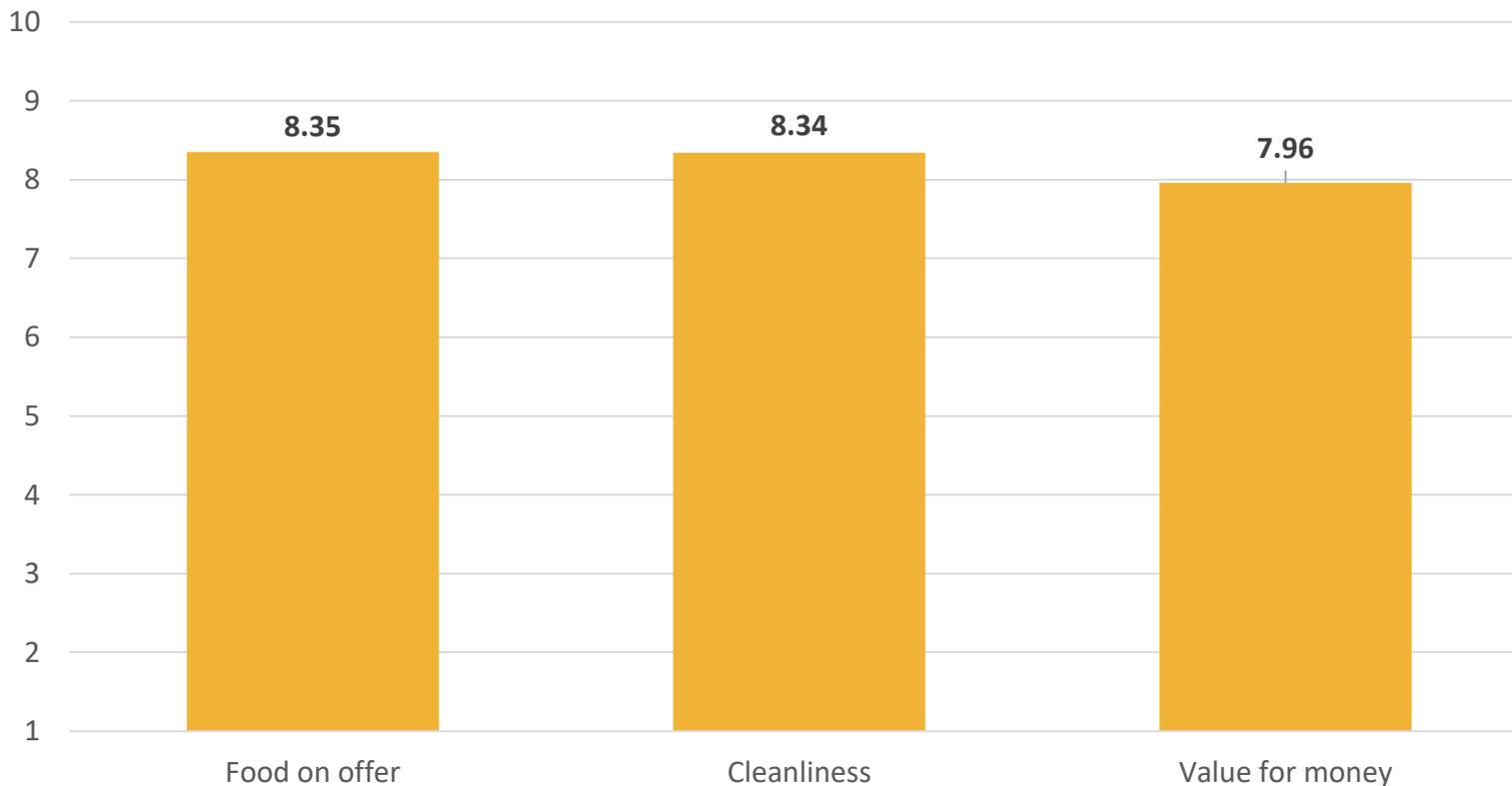
These metrics were again rated highest among visitors from overseas.



Visit Satisfaction: Overall Impressions

Visitors demonstrated high levels of satisfaction in terms of the food on offer and cleanliness in the area. Value for money, being one of the most challenging visitor satisfaction metrics, was rated only slightly below the 8-point threshold.

All of the below impressions were rated more positively by visitors from overseas. In particular, value for money was rated above 8 out of 10.



Visit Satisfaction: Overall Impressions

The most important metrics, overall satisfaction and likelihood to recommend, encouragingly scored the highest amongst all ratings.

There is a high probability of referrals and recommendations to others among Angus visitors as 6 out of 10 visitors attributed a likelihood to recommend score of 9 or 10 out of 10, which resulted in the overall Net Promoter Score of 56%.*

Likelihood to recommend



Overall

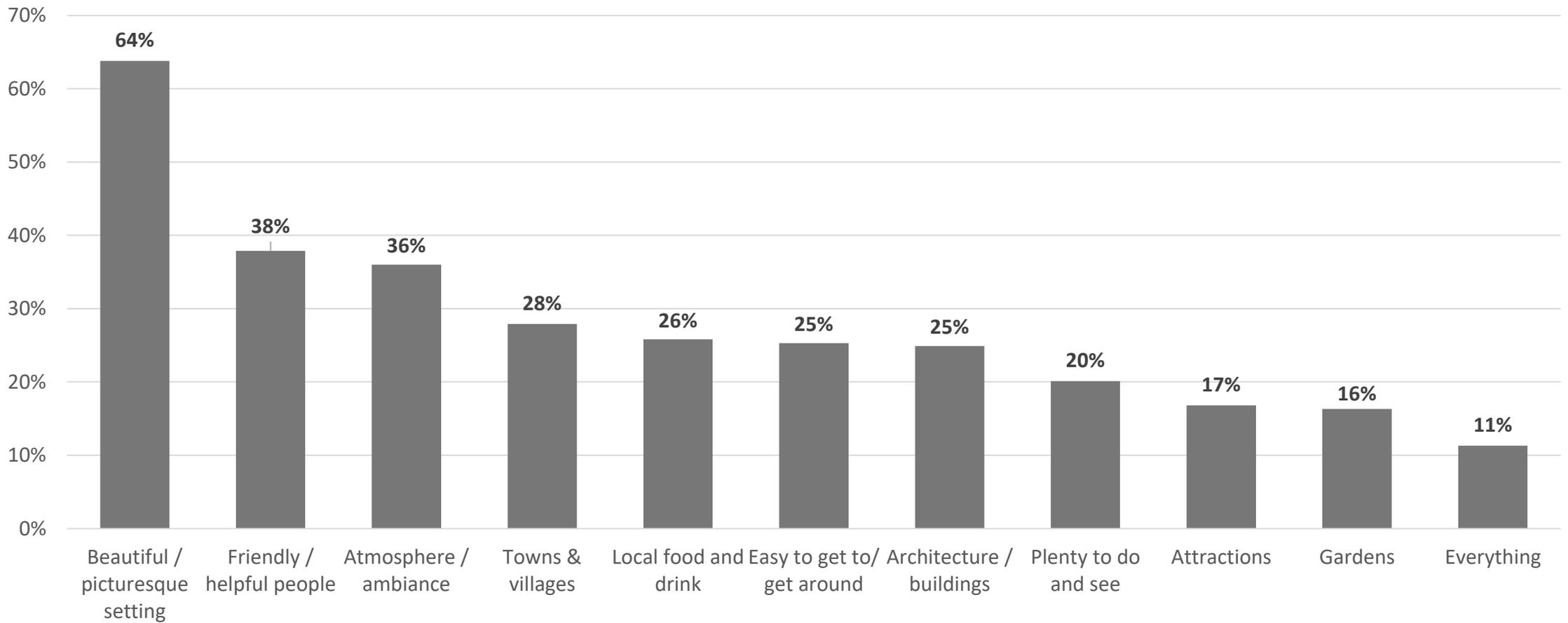


*Net Promoter Score deducts proportion of those who gave 1-6 points (defined as detractors) from the proportion who gave 9 / 10 points (defined as promoters).

Visit Satisfaction: Most Impressive Aspect of Visit

Visitors most enjoyed the beautiful / picturesque setting, friendly / helpful people and atmosphere in the area.

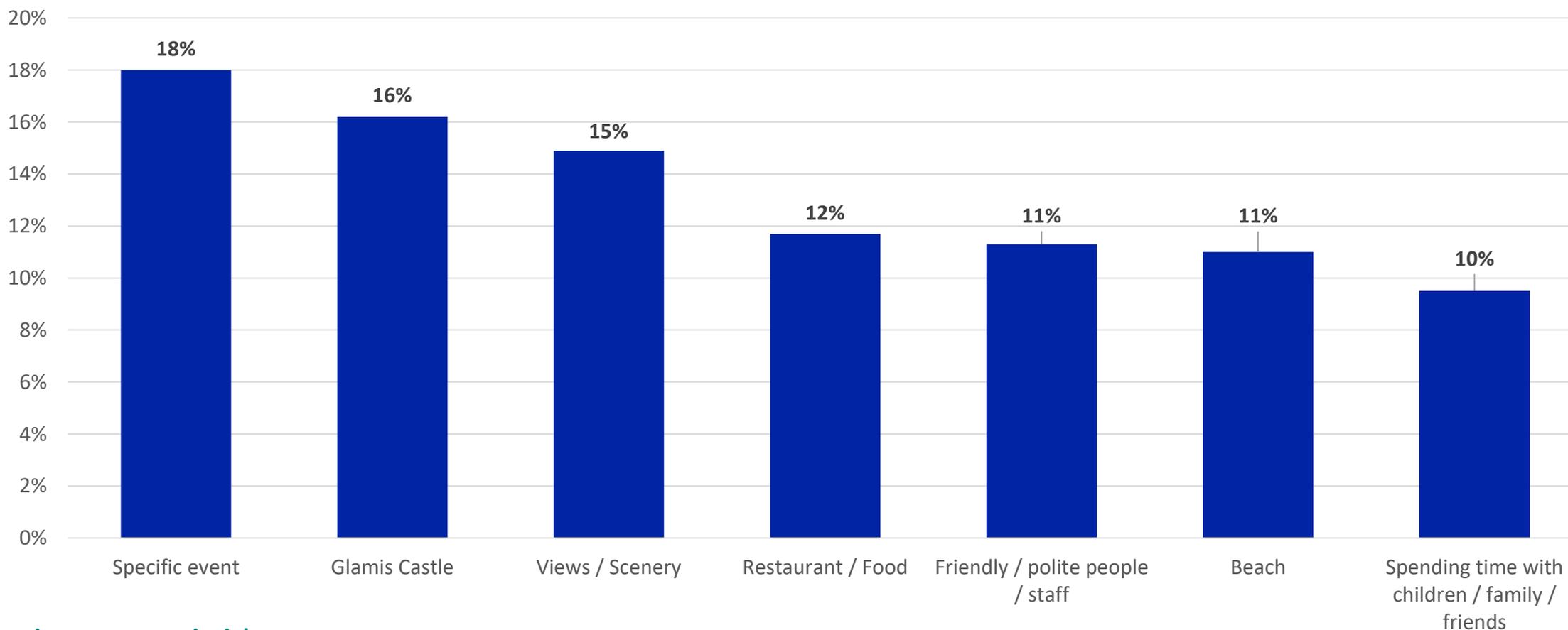
The beautiful scenery and the atmosphere were particularly valued by overseas visitors.



Visit Satisfaction: Best Aspects of Angus In Visitors Words

Without being prompted, visitors mentioned specific events as the best aspect of their visit. This feature was most commonly stated by local audiences visiting from Scotland.

Glamis Castle was the best part of the trip for 16% of visitors and was especially appreciated by visitors from overseas (34%).



Visit Satisfaction: Best Aspects of Angus In Visitors Words

“ I was in Brechin for the Harley Davidson in the City event, which was excellent. The atmosphere in the town was fantastic! ”

“ Trip around Glamis Castle due to tour guide. She was a small slim lady, very friendly, informative and lovely to the children. ”

“ Trying a local smoked fish and chips at the harbour in Arbroath and a walk on Lunan bay beach. ”

“ Relaxed atmosphere and stunningly beautiful scenery with interesting attractions and friendly people. ”

“ Our visit to Glamis Castle was very enjoyable - it was the main purpose for our visit to Angus. ”

“ Beautiful countryside to walk through and cosy pubs to recover in. ”

“ Bonfest is well organised, fun and friendly without being too big an event. ”

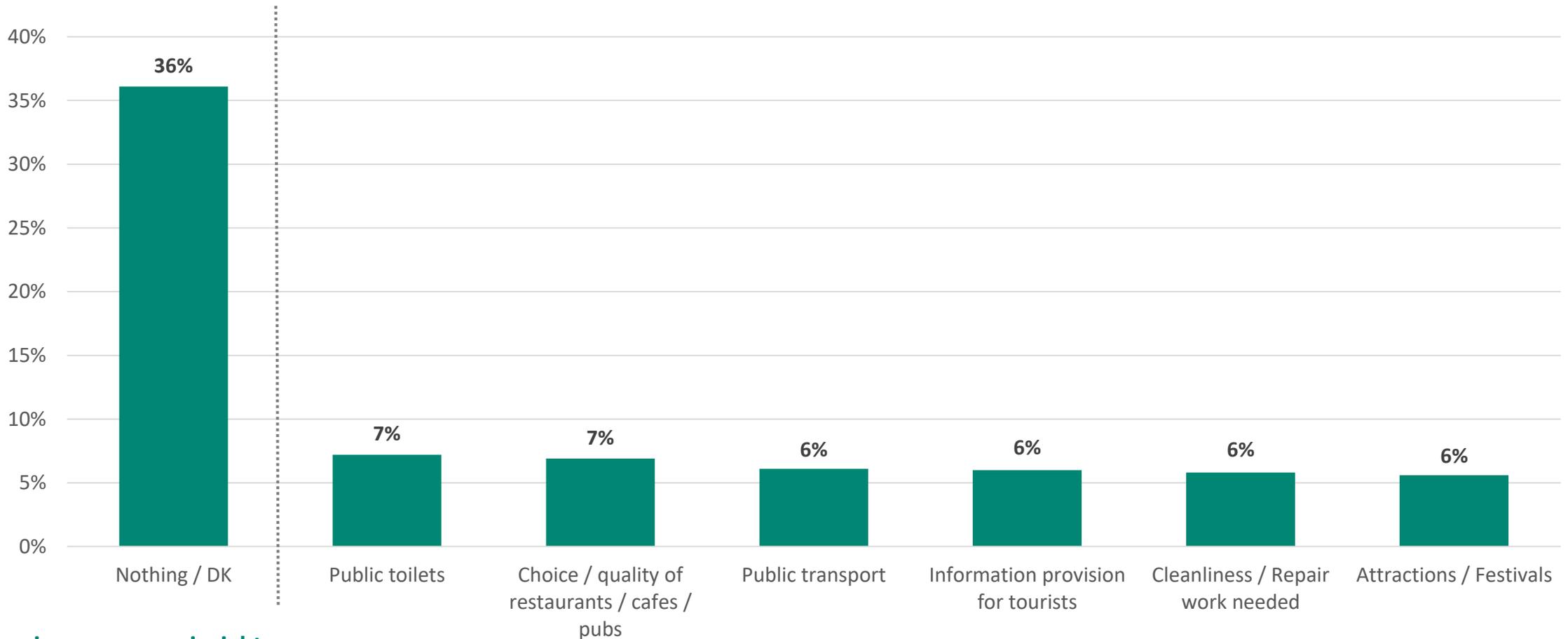
“ The gardens and architecture at Glamis Castle were breath-taking. ”

“ Visiting and walking along various beaches. Enjoyed looking around Montrose and Arbroath. ”

Visit Satisfaction: Improvement Aspects of Angus In Visitors Words

Visitors were generally satisfied with their visit leaving only a few ideas about improvement factors. The most pronounced improvement factors were public toilets (7%) and choice / quality of restaurants / cafes / pubs (7%).

Visitors with children were most likely to be dissatisfied with public toilets (14%).



Visit Satisfaction: Improvement Aspects of Angus In Visitors Words

“ For me there was nothing that could be improved and I would happily visit and recommend Angus to others. ”

“ It was just perfect and one of the best times I've ever had. ”

“ Scruffy town centre, litter in the streets and a feeling of decay in Arbroath. Very sad. Whereas the harbour was interesting and lively. ”

“ Montrose is such an interesting place but not a lot in the way of restaurants. The Old Corner House was sorely missed. The bypass I think hurts tourism. ”

“ The kids really needed to go to the toilet; unfortunately the toilets that were signposted were locked. ”

“ Nothing really, except maybe prices that are a wee bit more affordable for students. ”

“ Better public transport links to the attractions, which were based more in the countryside ”

“ Arbroath is lovely but there is little information about where the high street is from the harbour which is where most people will arrive for days out. ”

“ Seafest - would like to see more local producers - like those seen at Easthaven Food Fest. ”

Visit Satisfaction: Key Findings

Satisfaction with Customer Service

Angus provides high standards of customer service to visitors. The highest satisfaction levels were evident at visitor attractions (8.66) and restaurants / cafes (8.29) whilst the opposite was true for transport providers (7.74).

Those who visited Glamis Castle were generally more satisfied with customer service in Angus than those who did not.

Likelihood to recommend

Overall impressions of Angus were positive. The overall visit and likelihood to recommend achieved the highest ratings (8.68 and 8.75, respectively). Encouragingly although as to be expected, staying visitors attributed higher satisfaction levels compared to day visitors.

Best & Improvement Aspect

When prompted, visitors most commonly appreciated the beautiful / picturesque setting, friendly / helpful people and atmosphere of the area.

When asked to comment in their own words, visitors positively evaluated specific events, Glamis Castle and the views / scenery.

As evident from the above, visitors were mostly satisfied with their visit and as a result provided a limited range of improvement comments.

Visitor Expenditure: Per Person Per Day Expenditure

		Day visitors N=322	Overnight visitors outside Angus N=61	Overnight visitors in Angus N=215
	FOOD & DRINK	£9.59	£12.43	£12.05
	SHOPPING	£5.00	£5.17	£6.22
	ENTERTAINMENT	£5.40	£9.30	£3.94
	ACCOMMODATION	-	-	£23.49
	TRANSPORT	£3.51	£3.07	£3.50
	TOTAL	£23.50	£29.97	£49.20

Visitor Expenditure: Key Findings

Spend of Day Visitors	Day visitors spent an average of £23.50 per person per day. Eating and drinking expenditure accounted for the largest share of day trip spending (£9.59 or 41% of all expenditure).
Spend of Staying Visitors in Angus	As to be expected, visitors who stayed in Angus spent notably more than other types of visitors due to their accommodation expenditure. They spent an average of £49.20 per person per day.
Spend of Staying outside Angus	Visitors who stayed outside of Angus spent £29.97 on average. Their daily spend on eating and drinking was highest among the three groups (£12.43).
Average Spend by Visitor	The average spend of visitors to Angus overall was £33.40 per person per day.

Main Segments

- In addition to analysing visitor markets based on demographic variables we segmented visitors based on their visiting motivations and attitudes towards Angus.
- To facilitate this type of customer segmentation, the survey included two psychographic questions. This allowed us to build visitor segments using factor/cluster analysis techniques.
- On the following pages, we introduce Angus’s target segments that we describe as:

Segment 1	Sightseers
Segment 2	Event-Goers
Segment 3	Relaxers
Segment 4	Relaxing Friends and Family Timers
Segment 5	Interactive Friends and Family Timers

- A final section of this report identifies overlaps between Angus and VisitScotland’s five target segments.

Main Segments: Sightseers (22% of visitors)

- Sightseers are first time visitors coming to Angus to visit attractions and experience history and heritage as well as different culture.
- They are holidaymakers visiting Angus as a part of a broader area trip and they are likely to be overseas visitors (46%) mostly from USA, Australia and Germany. The majority of them travel without children.
- They are an accessible market as they commonly use information sources (both before and during their visit). The VisitScotland website plus other websites and TripAdvisor are their most popular information sources before visiting. During their visit they are likely to use free brochures or go to visitor information centres.
- Nearly half stay outside of Angus, visiting for a day from their overnight location, predominantly from Edinburgh and Perthshire.
- There is high likelihood of them staying at hotels (46%) and B&Bs (29%).
- 9 out of 10 sightseers visited at least one attraction during their trip. The most popular destination was Glamis Castle (73%), with many considering this to be the best part of their trip, and Arbroath Abbey (28%). Sightseers also appreciate views, scenery and the friendliness of local people.
- They attribute high satisfaction ratings for many aspects of the visitor experience. They are also more likely to state that nothing could have been improved to make their trip more enjoyable.
- They are the highest spenders among all segments, spending £42.62 per person per day. They are the highest spenders on eating and drinking and accommodation. Sightseers who stay in Angus spend the most per person per day.

Main Segments: Event-Goers (13%)

- A large majority of Event-goers are day trippers (71%) for whom Angus is the main or only location on their trip.
- Event-goers are a slightly younger audience than average and are comprised of a high proportion of males (60%). Commonly they are visiting from other parts of Scotland, mainly Aberdeen (38%).
- They use the least information (both before and during the visit) out of all identified segments. Around half used information before the visit and only a quarter accessed information during the visit. Of those who accessed information, websites and social media are important channels.
- They travel to the area for a specific event (52%), such as The Senior Open (15%), and are more likely to be attracted by golf (14%). Outdoor activities (24%) also play a prominent role in their decision to visit Angus.
- They enjoy visiting local events, which tend to be a highlight of their trip, going to pubs, bars and restaurants. They are less likely to visit attractions.
- A minority stay overnight in Angus (29%) and, of those who do, they stay 2.52 nights on average which is the lowest out of the segments. They stay mostly at hotels which have a convenient location and are nearby the specific event they attend.
- Overall they demonstrate the lowest satisfaction levels which might be due to the short amount of time they spend in the area.
- They feel that public toilets and prices could be improved in order to make their trip more enjoyable.
- Event-goers spend the second highest amount of all segments, spending £33.34 per person per day. They are the highest spenders on entertainment.

Main Segments: Relaxers (24%)

- Relaxers are frequently repeat visitors to the area who travel without children.
- They are very local audience (83% are Scottish), visiting from nearby Perth and Kinross / Dundee with a high proportion of them females (63%).
- More than 6 out of 10 visit only for a day. Those that stay overnight mainly stay in Angus and spend 4.23 nights on average which makes them the longest staying segment. They are likely to stay at hotels (34%) or caravans (25%) looking for the best value for money (44%) and special offers (21%).
- They demonstrate an average level of information consumption. They are most likely to use TripAdvisor during their visit (31%).
- This segment enjoys visiting beaches, engaging in outdoor activities and seeking relaxation whilst escaping noise and crowds. The beaches, walking and restaurants are the best aspects of their trip. Half of them do not visit any attractions.
- They positively rate the food on offer in the area (8.80) and there is a high probability of referrals and recommendations among these visitors to others.
- Improvements to public toilet facilities would make their trip more enjoyable.
- Relaxers tend to spend the least during their visit (£26.39 per person per day).

Main Segments: Relaxing Friends and Family Timers (19%)

- Almost all relaxing friends and family timers are repeat visitors (94%). A high proportion of these visitors are women and/or are travelling with children. They are more likely to visit from the rest of UK (27%) than other segment.
- Their main drivers to visit Angus are friends and relatives in the area (87%) as well as a previous visit (34%). They come to catch up with family, relax, escape crowds and noise and at the same time enjoy visiting beaches and engaging with nature and wildlife. They also like going to pubs, bars and restaurants.
- They do the least research prior to their visit. That said, those that actively look for information highly rely on word of mouth (64%) and social media (39%).
- Around a half of them stay overnight with 6 out of 10 staying with friends and relatives.
- They are most likely to refer and recommend Angus to others of all the segments identified.
- The best aspects of their trip are relaxing atmosphere, beaches, food, restaurants and spending time with children and family.
- They feel that cleanliness could be improved in order to make their trip more enjoyable.
- This segment spends less than the average visitor (£28.40 per person per day).

Main Segments: Interactive Friends and Family Timers (22%)

- Interactive friends and family timers are predominantly repeat visitors (91%) who come to the area regularly - 68% had visited more than 10 times in the past 5 years. For 74% of them, Angus is their only or main destination.
- They are a slightly older audience than average with a high majority of them being Scottish (77%).
- The key drivers to their visit are friends and relatives (71%) and specific events (36%), but they are also motivated by a high range of other activities such as visiting Angus towns and villages, museums and attractions or going to restaurants. They also like shopping when in the area.
- They are less likely to do any research prior to their visit. That said, those that use pre-visit information rely mostly on word of mouth (50%) and social media (41%). Social media is also the main source of information during their trip (40%).
- Around a half of them stay overnight and they are most likely to stay in Angus (93%) with friends and relatives (71%).
- The best part of their trip is catching up with friends and family and the specific event they attend.
- They attribute the highest overall satisfaction with their visit and they are very likely to refer and recommend Angus to others. Restaurants, pubs and transport in the area were greatly appreciated by interactive friends and family timers.
- They would like to see a wider range of attractions and festivals in the area.
- Their overall spend per person per day is £33.09. The biggest share of their expenditure is eating and drinking.

Main Segments: Summary & Overlap with VisitScotland Target Segments



Sightseers (22%)

- First time visitors
- High proportion from overseas
- Interested in history and heritage, appreciate views, scenery and the friendliness of local people
- Highly likely to stay at hotels and B&Bs
- An accessible market - commonly use information sources (before and during visit)
- The majority travel without children
- The highest spenders
- The highest proportion falling into the 35-54 age group



Engaged Sightseers

- Interested in breath-taking scenery and landscape, fascinating history & culture, new and interesting things to discover
- The most preferred types of accommodation are hotels and B&Bs
- Use a range of offline and online sources for both holiday inspiration and planning
- Mainly adult only households
- **The highest proportion falling into the 55+ age group**



Event-Goers (13%)

- Commonly day trippers; Angus is their main or only destination
- Slightly younger, local audience comprised of a high proportion of males
- Visit for a specific event
- Use the least information sources
- The second highest spenders



Relaxers (24%)

- Frequently repeat visitors often traveling without children
- Very local audience
- Commonly day trippers, however, those that stay in Angus spend the longest time of all segments
- Visit beaches, engage in outdoor activities, seek relaxation
- Spend the least during their visit



Relaxing Friends and Family Timers (19%)

- The vast majority repeat visitors, high proportion of women traveling with children; the highest proportion falling into the 35-54 age group
- More likely to visit from the rest of UK
- Visit family/friends, beaches, relax, engage with nature and wildlife
- Those that stay in Angus overnight commonly stay with friends and relatives, the second most common accommodation type - rented flat / house / cottage
- Spend less than the average visitor



Natural Advocates

- Regular visitors
- A high proportion of them have friends and relations living in Scotland and they have a strong relationship with Scotland
- Enjoy beautiful scenery and landscapes, walking, visiting natural sites, watching wildlife and getting away from it all
- Highest proportion falling into 35-54 age group
- **More likely to use self-catering accommodation, less likely to stay with friends and relatives**



Interactive Friends and Family Timers (22%)

- The vast majority repeat visitors; come to the area regularly
- Slightly older, local audience
- The key drivers to visit are friends and relatives, also motivated by a high range of other activities (i.e. events, towns and villages, attractions etc.)
- Those that stay in Angus overnight commonly stay with friends and relatives

Note:

This slide identifies two broadly overlapping segments comparing Angus and VisitScotland target segments. Whilst the two VisitScotland segments share many attributes of the equivalent Angus segments there are also differences between them. The key differences are highlighted in red text. Also, it should be borne in mind that the five VisitScotland target segments – Adventure Seekers, Curious Travellers, Engaged Sightseers, Food-Loving Culturalists and Natural Advocates – were derived from UK audience research only whilst Angus target segments include overseas audiences.

Angus Visitor Survey

For more information please get in touch with:

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