

From: [Foi Enquiries](#)
To: [REDACTED]
Subject: EIR-17-0227 - Provost Skene House
Date: 14 March 2017 10:23:45
Attachments: [PSH Market & Audience Research Report Draft.pdf](#)
[Question 2 attachment - pshpostcodes.txt](#)
[Question 4 attachment - 10_Trailblazers \(2\).jpg](#)
[Question 4 attachment - PSH Heroes \(2\).jpg](#)
[Further Information - Right to Review & Appeal.pdf](#)

Dear [REDACTED]

Thank you for your information request of 8 February 2017. Aberdeen City Council (ACC) has completed the necessary search for the information requested. Please accept our apologies for the delay in responding to your request.

I should appreciate it if you would please provide me with the following:

1) The documented proposals (report and recommendation) for the redevelopment of Provost Skene's House inclusive of the options considered and discounted.

The redevelopment of Provost Skene's House was ratified by Finance, Policy & Resources committee on 20th September 2016. A further update report was presented to committee on 17th November 2016 outlining further details on the proposed interpretation design and essential works alongside the important links to our cultural and economic strategies. Please find attached a copy of the Market Audience and research Report.

2) The documented details of the public consultation and surveys, inclusive of;

a) the questions asked,

The Provost Skene's House line-up was drawn up with the guidance of a steering group, which included representation from the tourism, cultural, academic and business sectors. Consideration in determining the final line-up included space and available and exhibition material.

The survey involved a public poll for a "Hall of Heroes" on the ground floor – familiar faces intended to serve as a welcome. The public were asked to vote for their hero in each of five categories: Stars of Stage and Screen; Musical Maestros; Sporting Champions; Wizard Wordsmiths; and Scientific Saviours – 50 candidates in all. The categories were chosen by the project management team and design consultancy to cover a cross-section of disciplines.

The two candidates with the highest number of votes in each category were to be chosen, giving 10 heroes.

The questions asked were:

What is your name?

What is your email address?

What is your postcode?

Would you like to be contacted about future Masterplan surveys?

[These questions were asked and the options below given]

Who is your Stars of Stage and Screen Hero (please choose only one)?

Who is your Musical Maestro Hero (please choose only one)?

Who is your Sporting Champion Hero (please choose only one)?

Who is your Wizard Wordsmith Hero (please choose only one)?

Who is your Scientific Saviour Hero (please choose only one)?

- | ◆ STAGE STARS ◆ | ◆ MUSICAL MAESTROS ◆ | ◆ SPORTING CHAMPIONS ◆ | ◆ WIZARD WORDSMITHS ◆ | ◆ SCIENTIFIC SAVIOURS ◆ |
|--|---|--|--|---|
| <input type="checkbox"/> 1. Harry Gordon | <input type="checkbox"/> 1. James Scott Skinner | <input type="checkbox"/> 1. Donald Dinnie | <input type="checkbox"/> 1. John Barbour | <input type="checkbox"/> 1. Matthew Hay |
| <input type="checkbox"/> 2. Scotland The What? | <input type="checkbox"/> 2. James Bruce Duncan | <input type="checkbox"/> 2. Denis Law | <input type="checkbox"/> 2. George MacDonald | <input type="checkbox"/> 2. Dugald Baird |
| <input type="checkbox"/> 3. Peter Mullan | <input type="checkbox"/> 3. Gavin Greig | <input type="checkbox"/> 3. Sir Alex Ferguson | <input type="checkbox"/> 3. Charles Murray | <input type="checkbox"/> 3. May Baird |
| <input type="checkbox"/> 4. Jon S. Baird | <input type="checkbox"/> 4. Ian Campbell | <input type="checkbox"/> 4. Ian Black | <input type="checkbox"/> 4. Nan Shepherd | <input type="checkbox"/> 4. Hans Walter Kosterlitz |
| <input type="checkbox"/> 5. Rose Leslie | <input type="checkbox"/> 5. John McLeod | <input type="checkbox"/> 5. Willie Miller | <input type="checkbox"/> 5. Sheena Blackhall | <input type="checkbox"/> 5. Robert Daniel Lawrence |
| <input type="checkbox"/> 6. Michael Clark | <input type="checkbox"/> 6. Evelyn Glennie | <input type="checkbox"/> 6. Paul Lawrie | <input type="checkbox"/> 6. Stanley Robertson | <input type="checkbox"/> 6. John Michael Kosterlitz |
| <input type="checkbox"/> 7. Angela Towler | <input type="checkbox"/> 7. Annie Lennox | <input type="checkbox"/> 7. Katherine Grainger | <input type="checkbox"/> 7. James Naughtie | <input type="checkbox"/> 7. Frederick Soddy |
| <input type="checkbox"/> 8. Annie Inglis | <input type="checkbox"/> 8. Lisa Milne | <input type="checkbox"/> 8. Timothy Baillie | <input type="checkbox"/> 8. Ian Macpherson | <input type="checkbox"/> 8. Richard Laurence Millington Sygne |
| | <input type="checkbox"/> 9. Seb Rochford | <input type="checkbox"/> 9. David Carry | <input type="checkbox"/> 9. Bishop William Elphinstone | |
| | <input type="checkbox"/> 10. Paul Mealar | <input type="checkbox"/> 10. Nell Fachie | <input type="checkbox"/> 10. James Chalmers | |
| | <input type="checkbox"/> 11. Emell Sandé | <input type="checkbox"/> 11. Hannah Miley | <input type="checkbox"/> 11. William Alexander | |
| | | | <input type="checkbox"/> 12. Stuart MacBride | |

b) the dates the public consultation/surveys were conducted, how and by whom,

The vote ran from January 23, 2017, to February 12, 2017. The poll was conducted by Aberdeen City Council. People could vote online via the Aberdeen City Council website using Citizen Space. Hard copies of the voting slips were made available at libraries, communities and Marischal College.

c) the documented origin of those who responded (City,Shire, Visitor, etc) to the consultation/survey and,

Attached are full details of the postcodes that were entered into our online survey which indicates the origin of the response user for all online responses (90%) of returns. Please see attached document 'PSHPostcodes'.

d) the documented (individual) responses to the consultation/surveys.

There were 208 postal returns and 1,779 online returns = 1,987 respondents.

Please note; not all respondents cast a vote in every category, so the total number of votes in each category varies.

The top two from each category were chosen. Their percentage share of the total category vote is shown in brackets

Stars of Stage and Screen

Harry Gordon (1893–1957) – Comedian 127
Scotland the What? (1969–1995) – Comedy revue 741 (44%)
Peter Mullan (born 1959) – Actor 179
Jon Baird (born 1972) – Director 71
Rose Arbuthnot-Leslie (Rose Leslie) (born 1987) – Actor 100
Michael Clarke (born 1962) – Dancer 95
Angela Towler (born 1975) – Dancer 95
Annie Inglis (1922–2010) – theatre producer 260 (16%)

Total votes: 1,668

Musical Maestros

James Scott Skinner (1843–1927) – Fiddler 194
James Bruce Duncan (1848–1917) – Collector of Folk Songs 13
Gavin Greig (1856–1914) – Collector of Folk Songs 27
Ian Campbell (1933–2012) – Reviver of Folk music 15
Dame Evelyn Glennie (born 1965) – Percussionist 436 (26%)
Annie Lennox (born 1954) – Singer-songwriter 550 (33%)
Lisa Milne (born 1972) – Musical artist 46
Seb Rochford (born 1973) – Drummer and jazz musician 57
John McLeod (born 1934) – Composer 18
Paul Mealor (born 1975) – Composer 44
Emeli Sandé (born 1987) – Singer-songwriter 251

Total votes: 1,651

Sporting Champions

Donald Dinnie (1837–1916) – Scottish strongman 163
Denis Law (born 1940) – Footballer 750 (40%)
Sir Alex Ferguson (born 1941) – Football manager 256 (14%)
Ian Black (born 1941) – Swimmer 41
Willie Miller (born 1955) – Footballer 97
Paul Lawrie (born 1969) – Golfer 78
Katherine Grainger (born 1975) – Rower 163
Timothy Baillie (born 1979) – Canoeist 20
David Carry (born 1981) – Swimmer 26
Neil Fachie (born 1984) – Cyclist 137
Hannah Miley (born 1989) – Swimmer 150

Total votes: 1,881

Wizard Wordsmiths

John Barbour (1320–1395) – Poet 67
George Macdonald (1824–1905) – Author of Phantastes: A Faerie Romance 64
Charles Murray (1864–1941) – Doric poet 92
Nan Shepherd (1893–1981) – Scottish novelist and poet 168
Sheena Blackhall (born 1947) – Poet and traditional storyteller 165
Stanley Robertson (1940–2009) – Poet and folk singer 95
James Naughtie (born 1951) – Broadcaster and writer 154
Ian Macpherson (1905-1944) – Scottish novelist 24
Bishop William Elphinstone (1431 – 25 October 1514) 236 (15%)
James Chalmers (1713 –1764) – Founder of Aberdeen Journal 72
William Alexander (1826-1894) – Pioneering journalist of Aberdeen Free Press 48
Stuart MacBride (born 1969) – Author 390 (25%)

Total votes: 1,575

Scientific Saviours

Matthew Hay (1855–1932) – Father of Aberdeen’s Joint Hospital Scheme and pioneering Medical Officer in Scotland 230
Dugald Baird (1899 –1986) – Professor of Obstetrics and social pioneer 442 (29%)
May Baird (1901–1983) – Doctor, social pioneer and first woman to hold position of Chair on the regional hospital board 236 (15%)
Hans Walter Kosterlitz (1903–1996) – Key discoverer of endorphins 136
R D Lawrence (1892–1968) – Founder of British Diabetic Association 197
J. Michael Kosterlitz (born 1943) – Professor of physics, awarded for work on condensed matter physics 149
Frederick Soddy (1877–1956) – Radiochemist who investigated into the use and origin of isotopes 99
Richard Laurence Millington Synge (1914–1994) – Biochemist and inventor of partition chromatography 59

The individual documented surveys are considered exempt from disclosure as they contain the sensitive personal details of the respondents to the survey and information of this nature is considered exempt from disclosure. In order to comply with its obligations under the terms of Section 16 of the FOISA, ACC hereby gives notice that we are refusing your request under the terms of Section 38(1)(b) in conjunction with 38(2)(a)(i) - of the FOISA.

In making this decision ACC considered the following points:

ACC is of the opinion that Section 38(1)(b) applies to the information specified above as the information in question is personal information relating to living individuals, of which the applicant is not the data subject.

ACC is of the opinion that Section 38(2)(a)(i) applies, as that disclosure of this information would be a breach of the first Data Protection Principle (that personal information must be processed fairly and lawfully). The third parties involved would not expect ACC to release this information about them into the public domain under the FOISA.

3) The documented decision to convert Provost Skene’s House into a museum to celebrate the story of locals, past and present, inclusive of the names of those who voted to approve the proposal.

The redevelopment of Provost Skene’s House was ratified by Finance, Policy & Resources committee on 20th September 2016. An update report was presented to committee on 17th November 2016 outlining further details on the proposed interpretation design and essential works alongside the important links to our cultural and economic strategies.

There wasn’t a vote on this item but a list of all members marked as present is available at the top of the minute - <http://committees.aberdeencity.gov.uk/documents/g3866/Printed%20minutes%2020th-Sep-2016%2014.00%20Finance%20Policy%20and%20Resources%20Committee.pdf?T=1>

Therefore, as this information is otherwise accessible (e.g. on a website), it is exempt from disclosure. In order to comply with its obligations under the terms of Section 16 of the FOISA, ACC hereby gives notice that we are refusing your request under the terms of Section 25(1) - Information Otherwise Accessible - of the FOISA.

4) Proposed plan and elevation drawings of the interior of Provost Skene’s House that illustrates how each floor will be used for displays, both static and interactive.

Detailed drawings are still been developed for PSH however the attached images(PSH Heroes and trailblazers) provide an insight to the proposals to date.

We hope this helps with your request.

Yours sincerely,

Information Compliance Team

INFORMATION ABOUT THE HANDLING OF YOUR REQUEST

As the information which you requested is environmental information, as defined under Regulation 2(1) of the Environmental Information (Scotland) Regulations 2004 (the EIRs), ACC considered that it was exempt from release through FOISA, and must therefore give you notice that we are refusing your request under Section 39(2) of FOISA (Freedom of Information (Scotland) Act 2002). However, you have a separate right to access the information which you have requested under Regulation 5 of the EIRs, under which ACC has handled your request. Please refer to the attached PDF for more information about your rights under the EIRs.

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*03000 numbers are free to call if you have 'free minutes' included in your mobile call plan.
Calls from BT landlines will be charged at the local call rate of 10.24p per minute (the same as 01224s).

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ABERDEEN CITY COUNCIL

**PROVOST SKENE'S HOUSE
REDEVELOPMENT – VISITOR
MARKET POTENTIAL**

Draft Report



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CONTENTS

<u>Section</u>	<u>Page</u>
1.0 Introduction	1.
2.0 Visitor & Non Visitor Consultation – Summary	5.
3.0 Visitor & Non Visitor Consultation – Segmentation Analysis	9.
4.0 Market Appraisal	18.
5.0 Comparator Analysis	28.
6.0 Visitor Market Potential	31.
7.0 Conclusion & Recommendations	37.

Appendices

Appendix A	Visitor & Non-Visitor Consultation
Appendix B	Market Appraisal
Appendix C	Survey Data (please see separate document)

1.0 INTRODUCTION

1.1 Introduction

The reopening and redevelopment of Provost Skene's House (PSH) provides an opportunity to both extend and vary the cultural heritage offer for visitors to Aberdeen. This report assesses the visitor market potential for the redeveloped PSH identifying the scale of the visitor market, key market segments and a potential visitor forecast. The report draws on primary research conducted with visitors and non visitors to PSH and an in depth market appraisal exploring PSH's potential within the current Aberdeen market.

This study has been completed in collaboration with Studioarc who are preparing Exhibition and Interpretation Design proposals for PSH. The findings of the market research have directly informed Studioarc's proposals highlighting key elements of the visitor offer which could draw particular segments in order to support the audience development aspirations of Aberdeen City Council (ACC).

1.2 Provost Skene's House

Dating from 1545, PSH is one of Aberdeen's few remaining examples of early burgh architecture. For five centuries it has witnessed enormous change, both in its own structure and in the social, economic and political changes which have affected the city. PSH has evolved with the City of Aberdeen rendering it uniquely placed to explore the considerable change which has affected the city and its people over the past 500 years. The house is named after one of Aberdeen's most famous residents, Lord Provost George Skene, who commissioned some of the major alterations and renovations to the house, including the carved plaster ceilings and altering the exterior to the distinctive Scots Burgh style.

PSH is a Grade A listed building located in the centre of Aberdeen within Marischal Square. Marischal Square is currently undergoing significant commercial development which will see the immediate vicinity transformed into a new business, retail and leisure hotspot. Construction works necessitated the closure of PSH to the public in February 2013. The redevelopment of Marischal Square is itself another chapter in the story of Aberdeen and another opportunity for PSH to evolve with the city. The redevelopment is being delivered by Muse Developments and is anticipated to be complete by summer 2017. The revitalisation of PSH is presented as a core heritage component of this wider commercial development.

Prior to its closure, PSH presented a series of period rooms, furnished to show how people lived in the 17th, 18th and early 19th centuries. It included a café on the ground floor and small lecture space in the attic. There are currently a number of issues with the visitor experience including:

- accessibility (no accessible access above the ground floor)
- confusing interpretive layout
- disjointed visitor flow with no through access on all floors

- security barriers within the room settings minimising opportunities for direct engagement
- outdated visitor experience

1.3 Aberdeen Art Gallery & Museums

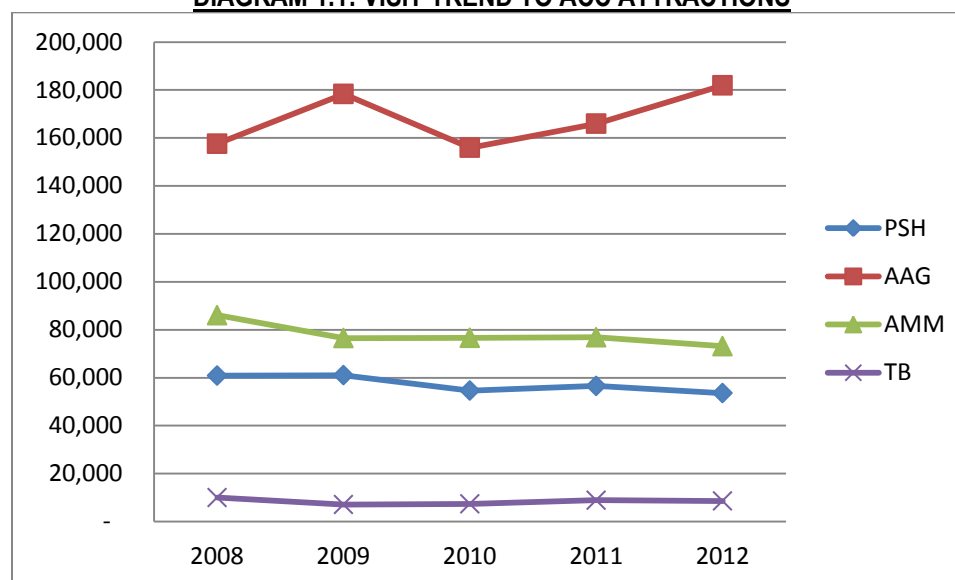
PSH is one of five heritage attractions run by ACC which together comprise Aberdeen Art Gallery & Museums. Other attractions include:

- **Aberdeen Art Gallery (AAG)** – houses nationally and internationally significant collections of 19th, 20th and 21st century fine art, a rich and diverse applied art collection and an exciting programme of special exhibitions. AAG is currently undergoing a significant £30million redevelopment and will reopen in winter 2017. Some of the AAG collections are currently on display at Drum Castle forming the Northern Lights temporary exhibition. The exhibition runs from April 2016 to March 2017.
- **Cowdray Hall** – one of the city's most popular concert venues. Adjoining AAG, the Cowdray Hall is also part of the ambitious redevelopment project.
- **Aberdeen Maritime Museum** – brings the history of the North Sea and its significance for Aberdeen and the north east to life.
- **The Tolbooth Museum** – one of Aberdeen's oldest buildings and best preserved 17th century and gaols in Scotland, The Tolbooth Museum explores local history and the development of crime and punishment through the centuries.

PSH is conveniently located within Aberdeen's city centre approximately 7 minute's walk from the train station. All of ACC's galleries and museums are clustered within close proximity, each accessible within a 3-4 minute walk of PSH.

The chart below presents the visit numbers for all ACC attractions from 2008 to 2012 (the last five fully operational years for PSH). All of ACC's museums and galleries are free to enter.

DIAGRAM 1.1: VISIT TREND TO ACC ATTRACTIONS



As illustrated above, AAG is by far the most visited of the four attractions. In 2012 AAG achieved approximately 182,000 visits. Projections indicate that AAG will exceed this volume considerably as a result of the redevelopment raising the profile and draw of Aberdeen City as a visitor destination in consequence.

The average visit number at PSH from 2010 to 2012 was approximately 55,000 (including café visits). Over the same period the average visit number at the Aberdeen Maritime Museum was approximately 75,600 (also including café visits). With an average visit number of approximately 8,300, the Tolbooth Museum was the least visited (the Tolbooth Museum has no café).

1.3 Redevelopment Aims & Objectives

ACC's aspiration is to revitalise PSH creating a first rate heritage attraction which draws a greater volume and more diverse range of audiences. Sitting at the heart of the medieval town of Aberdeen and also at the heart of the Marischal Square development, this project is designed to enhance the house's role in this setting and in 'telling the story' of historic Aberdeen. The focus of the redevelopment is the redisplay and enhancement of the interpretation with an emphasis on the building's history, its place in Aberdeen and the stories of the people who live there. The aim is to deliver a unique visitor experience distinct from that available at other historic properties providing more in depth engagement with the remarkable heritage the building represents.

It is intended that PSH is more firmly positioned as one in a suite of ACC attractions which together offer a variety of perspectives from which Aberdeen's multi-faceted heritage can be explored thus emphasising the overall appeal of a visit to Aberdeen and reaping benefits of audience sharing. Developing closer

relationships between PSH, the Aberdeen Maritime Museum and the Tolbooth Museum is a particular aspiration.

The wider Marischal Square development provides an important context for PSH providing the opportunity to re-assess the role of the building within the next phase of the area's evolution. Issues such as maintaining a strong presence and visibility within the regenerated Marischal Square are a key concern in order for PSH to retain a contemporary relevance and benefit from the uplift in footfall the development will bring.

Specifically, the purpose of the redevelopment is to:

- Refurbish and reconfigure the building prior to re-opening
- Improve accessibility
- Ensure that the house integrates with its new surroundings
- Improve opportunities for learning and engagement activities
- Review commercial activity

1.4 Study Methodology

Assessing the visitor market potential is a key component within the overarching study led by Studioarc. Jura Consultants' assessment of the visitor market potential has entailed the following core tasks:

- Visitor and non visitor research in order to identify current and potential audience profile and explore how they might like to see PSH developed
- Market appraisal analysing the volume, profile and behaviour of core markets and the offer and performance of competitor and comparator attractions benchmarking existing performance and highlighting any gaps which could potentially be addressed
- Visit number projections drawing from the findings of the consultation and market research quantifying the anticipated impact of the redevelopment proposals

1.5 Report Structure

The remainder of the report is structured as follows:

Section 2	summarises the results of the visitor and non visitor consultation
Section 3	summarises the consultation results pertaining to key audience segments
Section 4	appraises the current Aberdeen market
Section 5	reviews the visitor experience and performance of comparators
Section 6	quantifies the visitor potential for the redeveloped PSH
Section 7	sets out our conclusions and recommendations regarding the audience development potential of the redeveloped PSH

2.0 VISITOR & NON VISITOR CONSULTATION - SUMMARY

2.1 Introduction

This section presents the results of all public consultation performed with previous visitors and non visitors to PSH. The focus of the consultation was understanding the profile of visitors and non-visitors and to explore how they might like to see Provost Skene's House developed. The purpose of the consultation was as follows:

- To complement the findings of the market assessment and thus inform the visit number projections for the redeveloped attraction
- To directly inform Studioarc's visitor experience proposals
- To provide an insight into audience development opportunities at PSH but also for ACC more generally through comparison with data held for its other heritage attractions

Survey results are based on a combination of on-street survey research delivered by our market research partners What's Your View Ltd on an online survey with links shared by ACC and Muse Developments. Full details of our research methodology, including our response to certain issues which were encountered during the data gathering process are presented in Appendix A. The table below summarises the survey responses received:

TABLE 2.1 SURVEY RESPONSES BY TYPE			
	Total Responses	Invalid (incomplete and spoiled)	Valid Surveys
Online (to lunchtime 13 th May)	819	341 (277 incomplete, 64 duplicate IP addresses)	478
On-Street	228	0	228
Total			706
Previous Visitor			482
Non-Visitor			224

This section summarises the survey results drawing from the overall survey sample and/or from results pertaining to visitors and non visitors where most relevant. Full analysis is provided at Appendix A and full frequency responses are presented in Appendix C.

Section 3 of this report presents further analysis of specific segments which have been highlighted as worthy of further consideration during the analysis process. These segments provide further information pertaining to particular audience groups in order to help inform audience development strategies. This includes the responses by Lunchbreak Concert attendees who completed a paper copy of the survey distributed at the Lunchbreak Concert held on the 19th May. Lunchbreak Concerts are part of ACC's

Cowdray Hall programme currently being delivered at venues across the City due to the redevelopment works taking place at the Cowdray Hall and Aberdeen Art Gallery). A total of 21 survey returns from Lunchbreak Concert attendees were received.

2.2 Visitor and Non Visitor Consultation Summary

Sample

- Comprises respondents of a variety of ages, but mostly those aged 35-64 years (64%); relatively low proportion of young adults (7% aged 16-24yrs)
- Dominated by the local market with some representation of the day trip market (79% combined). Low representation amongst tourists (19%) and few respondents visiting Aberdeen specifically for a leisure visit (50%)
- 68% previous PSH visitors; 32% non PSH visitors

Previous Visitors (n=482)

- Museums (80%) and historic house/castle/property (77%) most commonly visited in past 12 months although also sizeable frequency of visitation to gardens, art galleries and outdoors/nature attractions (61-66%). Castle attractions within the local vicinity, but also across Scotland are particularly popular – visitors and non visitor responses combined
- Most typically visit culture/heritage attractions with another adult in a party of 2 (66%) followed by in a group which includes a child/children (33%)
- Mostly visit as part of a general visit to explore PSH and its collections (57%), followed by café motivated visits (21%); few visits motivated by attending an activity/event (5%) or specifically for children's activity/entertainment (1%)
- High awareness of other ACC attractions (>96%) and majority had recently visited at least one in the past 12 months (62%)
- High level of interest in proposed interpretive themes, three in particular 'Provosts to Paupers' (93%), 'Secrets in Stone' (89%) and 'The Silver City Emerges' (88%). The former was considered of particularly high interest with 63% indicating 'very interested'
- High level of interest in all proposed visitor experience elements, only guided tours, organised activities and contemporary art displays considered of moderate importance (although at the higher end of moderate, average scores 3.7-3.9 out of 5). Improved accessibility (4.3/5), child friendly (4.3/5) and high quality displays (4.3/5) were top (although only marginally ahead of the others)
- Main areas for other suggested improvements: café, maintaining presence/ visibility of PSH in the context of the wider Marischal Square redevelopment, desire for more activities, increased advertising. Significant volume of negative opinion towards the wider Marischal Square redevelopment believing it to be to the detriment of PSH
- Vast majority interested in visiting PSH post redevelopment (90%)
- PSH viewed as highly important within the wider redevelopment of Marischal Square (73%)

The unique and special sense of place exuded by PSH was something mentioned several times by previous visitors. The sentiment is encapsulated in the quotes below:

I love Provost Skene's House, was a regular visitor since it was reopened when I was a child and although the above activities sound wonderful, please do not detract from the essence that is the house - the house itself is the main attraction, the peaceful atmosphere where you can use your own imagination to picture the history behind it - don't wreck it!!!!

I must have visited Provost Skene's over a hundred times from my childhood until last year. The authenticity of the place was always the draw for me - it felt so untouched. The painted gallery was a huge favourite, even as a child - and so was the glass ceiling to the old kitchen, I LOVED that. I would like to note that in my opinion it was already an amazing place for children to visit - it would be great if some of the rooms were furnished in historical styles again, but this time visitors could sit on chairs / touch furniture, etc. in other words, replica furniture, instruments, etc.

Non Visitors (n=224)

- Lower rate of engagement across all categories than previous visitors. Most popular categories were historic house/castle/property (63%) and museums (60%). Castle attractions within the local vicinity, but also across Scotland are particularly popular – visitors and non visitor responses combined
- Most typically visit culture/heritage attractions with another adult in a party of 2 (53%) followed by in a group which includes a child/children (37%)
- From a sample comprised mostly of local residents, issues surrounding awareness are apparent (43% unaware). This is confirmed by the fact that lack of awareness was identified as the top barrier to engagement (39%). Encouragingly, few indicated a lack of interest in visiting historic house attractions (3%)
- Lower awareness of other ACC attractions than previous PSH visitors, Aberdeen Maritime Museum highest (81%) and higher proportion who had not recently visited other ACC attractions than previous PSH visitors (54%). Aberdeen Maritime Museum was the most visited (41%)
- Moderate-high level of interest in all proposed interpretive themes, particularly 'Provost to Paupers' and 'The Silver City Emerges' with a considerable proportion of 'very interested' responses
- High level of interest in all proposed visitor experience elements (higher than previous visitors). Improved accessibility (4.5), child friendly (4.4) and high quality displays (4.3) are top (although only narrowly ahead of the others). Greater level of interest than previous visitors in audio tours (73%), guided tours (71%) and (albeit to a lesser extent) contemporary art displays (53%)
- Main areas for other suggested improvements: café, desire for more activities, increased advertising. Sizeable volume of negative opinion towards the wider Marischal Square redevelopment believing it to be to the detriment of PSH
- Significant interest in visiting PSH post redevelopment (78%)
- Viewed as important within wider Marischal Square redevelopment (59%), although not quite as important as amongst previous visitors

2.3 Key Messages

- Previous visitors can be considered active and engaged with all ACC sites.
- A considerable proportion of current non visitors are considered 'within reach' as a result of their existing engagement with other ACC sites and/or existing tendency to visit/ interest in historic house/castle/property attractions. Awareness is a key issue.
- Opportunities for the three ACC sites to be conceived as a 'set' with opportunities for audience sharing and cross promotion are apparent.
- The consistency in terms of the themes visitors and non visitors are interested in and in the proposed visitor experience elements is positive from a resource perspective meaning that there is an opportunity to engage both key audience groups through, largely, the same approach. Some particularly popular themes emerge which is helpful for interpretive planning (Provosts to Paupers,' Secrets in Stone' and 'The Silver City Emerges'; Visitor experience elements: improved accessibility, child friendly experience and high quality displays combining technology, objects, sound smells and images).
- Elements of the visitor experience which appeal particularly to non visitors helpfully highlight where some resource could be specifically targeted in order to engage with new audiences. There is potential for an activity and events programme to tap in to these individual hooks and draw new and repeat audiences (see Section 3 for further analysis).
- There is considerable negative feeling towards the Marischal Square development. Concerns surrounding the visual imposition highlights the significance of the landscaping in the immediate vicinity and how this could be used to enhance the visibility and presence of PSH, and also satisfy a desire for some civic space. There is an expectation that the redevelopment will feature a café which will have to be managed if the decision remains not to include one.
- Importance of PSH to the residents of Aberdeen and surrounding areas, whether they have previously visited or not – a much loved asset situated within a contentious commercial development.

3.0 VISITOR AND NON VISITOR CONSULTATION – AUDIENCE SEGMENTS

The survey analysis process highlighted a number of specific audience segments which merited investigation in order to ascertain their development potential. This section presents the survey results pertaining to six such audience segments. Points highlighted in bold signify a trend particular to the segment in contrast to the overall survey findings.

3.2 Aberdeen Leisure Visitors (n=50)

This section presents the results from on-street survey respondents who indicated that they were visiting Aberdeen that day for a leisure visit (q16, on-street survey). This included 50 respondents.

- Vast majority had **not previously visited PSH** (80%) with lack of awareness being the greatest reason (56%). *For this reason comparison has been primarily made with non visitors*
- Most inclined to visit historic house/castle/property (68%) or museums (64%)
- Typically visit heritage/culture attractions with another adult (52%)
- Proportionately **lower rate of awareness of PSH** (46%) than amongst non visitors generally (57%)
- **Awareness of other ACC attractions** however mostly the Aberdeen Maritime Museum (78%) and **Tolbooth Museum (72%)**. Lower awareness of Aberdeen Art Gallery than amongst non visitors generally (50% compared to 60%)
- Significantly **higher rate of engagement with other ACC attractions** than non visitors generally (68% compared to 46%)
- **High level of interest in all proposed themes** (weighed average score range 4.2-4.6) which is considerably higher than amongst non visitors generally (3.7-3.9). All themes with the exception of 'The Way of the Spirits' achieved 94% interest (the former was still however popular with 84% interest). A greater proportion of this group were 'very interested' in all themes than amongst non visitors generally however **'Secrets in Stone'** in particular (70% very interested, compared to 35% amongst non visitors generally)
- Viewed all proposed visitor experience elements of high importance and overall more so than non visitors generally (weighted average score range (4-4.7). **A greater proportion considered all proposed elements to be 'very important'** than amongst previous visitors and non visitors. Specific aspects which particularly appealed to leisure visitors included **guided tour** and **temporary exhibitions** (76% and 61% very interested respectively compared to 46% and 37% amongst non visitors generally)
- Majority interest in visiting the redeveloped PSH (72%)
- **Over half believe PSH to be important to the redevelopment of Marischal Square (62%)**, slightly more than non visitors generally (59%)

3.3 Families (n=243)

This section presents the results from survey respondents who indicated that they typically visit historic/cultural attractions in a party which includes a child/ children aged up to 15 years (q3). There were 243 such respondents.

- Moderate majority had previously visited PSH (66%) – *previous visitors are therefore the most relevant comparison group*
- Mostly local residents (63%), large proportion **aged 34-44 yrs (38%)**
- Strong rates of engagement with most attraction types, **particularly historic house/ castle/ property (72%)**, museums (67%) and gardens (63%)
- High awareness of PSH (85%), on par with previous visitors generally
- High awareness of all other ACC attractions, particularly the Aberdeen Maritime Museum (93%). Only 7% were not aware of any others (compared to 1% amongst previous visitors generally)
- **Despite this a considerable proportion had not engaged with any others in the past 12 months** (47% compared to 38% amongst previous PSH visitors generally and 43% across the survey sample overall). Again, the Aberdeen Maritime Museum was the most visited (51%)
- **High level of interest in all but one of the themes** ('The Way of the Spirits', however its average weighted score was still a high moderate at 3.9). With the greatest proportion of 'very interested' response, 'Provosts to Paupers' emerges as the most popular theme (56% very interested), lower than amongst previous PSH visitors (63%) but higher than non visitors overall (41%)
- **High importance stressed on most of the proposed visitor experience elements** (weighted average score range of 3.6 to 4.7). As would be anticipated, a **child friendly experience** emerges as the most important, and is stressed in particular by this segment (74% viewed as important or very important compared to 55% amongst previous visitors generally). **Hands on/interactives** was also stressed (82% view as important or very important compared to 70% amongst previous visitors generally)
- Majority interest in visiting the redeveloped PSH (87% interested or very interested) which is slightly below that across previous visitors generally but on par with the survey sample overall
- Majority belief that the redevelopment is important for the Marischal Square redevelopment (68% important or very important), again slightly lower than that across previous visitors generally but on par with the survey sample overall

3.4 Young Adults Aged 16-24 (n=49)

This section presents the results from survey respondents aged 16-24 years (q17). There were 49 respondents.

- Majority had **not previously visited PSH** (67%) with lack of awareness being the greatest reason (53%). *For this reason comparison has been primarily made with non visitors*
- Most inclined to visit museums (55%) or historic house/castle/property (53%)
- Typically visit heritage/culture attractions with another adult (53%) or **with a party of adults (35%)**, proportionately greater than amongst previous visitors and non visitors (19-21%)
- Proportionately **lower rate of awareness of PSH** (47%) than amongst non visitors generally (57%)
- **Slightly lower awareness of other ACC attractions** than non PSH visitors overall, but again awareness of the Aberdeen Maritime Museum was greatest (80%). Similar rate of engagement as amongst non visitors generally (42%)
- **Moderate level of interest** in all proposed themes (weighed average score range 3.4-3.6) which is slightly lower than amongst non visitors generally (3.7-3.9). 'Provosts to Paupers' and 'The Silver City Emerges' are the top themes (67% respectively) but only narrowly more popular than the others overall. Greater proportion are 'very interested' in 'Land Beyond the Mountains' than non visitors overall (39% vs 32%). In contrast to the other audience types and segments, a **relatively strong degree of disinterest** is also expressed (range 27-37% somewhat/very uninterested).
- Viewed all proposed visitor experience elements of high importance (weighted average score range 4-4.5) with particular importance on child friendly experience (84% important + very important), high quality displays (82% important + very important), and temporary exhibitions (82% important + very important). Interestingly, **for almost all of the proposed elements, a greater proportion of young adults considered them to be 'very important' than amongst previous visitors or non visitors. Contemporary art displays** were viewed as 'very important' amongst this group in particular (51% compared to 30% amongst non visitors generally)
- Majority interest in visiting the redeveloped PSH (65%), although lower than amongst non visitors generally (78%)
- Almost half believe PSH to be important to the redevelopment of Marischal Square, the lowest of all segments considered

3.5 Lunchbreak Concertgoers (n=21)

This section summarises the responses of those who completed the questionnaire during the Lunchbreak Concert. This segment is therefore already actively engaged with ACC. With only 21 respondents it is difficult to have confidence surrounding the statistical significance of these results and therefore to draw meaningful comparison with the other segments. This does however provide interesting insights to trends which may be associated with this group. Results have been presented in terms of frequency rather than percentage owing to the possibility that a small number of responses may significantly influence the proportional split reported.

- Mostly represents an older age demographic aged 55+ (17/20 respondents)
- High awareness of PSH and high rate of engagement (19/20 have both heard of and previously visited)
- Actively engaged with culture/heritage attractions, particularly museums, art galleries and gardens (17-18/20) although historic house/castle/properties are also popular (13). Most typically visit in a party of two with one other adult (17), few visit in a party which includes a child/children (1)
- High awareness of all other ACC attractions (20-21), and recent engagement (all respondents had visited at least one of the Aberdeen Maritime Museum or Tolbooth Museum in the past 12 months).
- Interested in all proposed themes, particularly 'Provosts to Paupers' (16), 'Secrets in Stone' (14), and 'The Silver City Emerges,' (14)
- Stress most importance on increased accessibility (17), temporary exhibitions (16), hands on/ interactive displays (16), high quality displays combining technology, objects, sound, smells and images (16)
- Vast majority are very interested (16) in visiting the redeveloped PSH
- Vast majority view PSH as very important to the wider Marischal Square redevelopment (17)

3.6 PSH Non Visitors – ACC Visitors (N=103)

This section presents the results pertaining to respondents who had not previously visited PSH but had visited at least one other ACC attraction in the past 12 months (q10). Displaying recent engagement with ACC, this segment of non visitor should be within reach for PSH. This segment is considered non visitor type one (as opposed to type two below). There were 103 such respondents which is a little under half of the total non visitor sample (n=224). *Results for this segment have been compared with those for previous PSH visitors and non visitors, where most relevant.*

- Similar age range to non PSH visitors overall
- Considerable proportion had visited both the Aberdeen Maritime Museum and Tolbooth Museum (38%) although overall the **Aberdeen Maritime Museum** emerges as most popular (90% had visited in the past 12 months)
- Despite the active engagement with other ACC attractions, a considerable proportion were unaware of PSH (38%)
- This segment does however display a **tendency to visit historic properties** (68%) which is greater than amongst non visitors generally (63%). Particularly **high instances of recent engagement with museums** (93%) are also apparent
- Typically visit other attractions with another adult (54%) or in a party which includes a child/children (31%). Results are largely consistent with non PSH visitors generally
- High level of interest in the proposed themes which more closely mirror the results of previous PSH visitors than non visitors (weighted average score range 4-4.4). **'Land Beyond the Mountains'** emerges as a theme with high interest alongside 'Secrets in Stone,' 'Provosts to Paupers,' and 'The Silver City Emerges' (54% very interested compared to 42% amongst non PSH visitors generally)
- **High importance is stressed on all proposed visitor experience elements** (weighted average score range 4-4.5), higher than amongst previous PSH visitors and slightly higher still than non PSH visitors generally. In comparison to previous PSH visitors and non PSH visitors overall, this segment placed particular importance on **guided tours** (57% highlighted these as very important compared to 34% and 46% respectively). A **child friendly experience** was also particularly important to this group 61% compared to 55% amongst previous PSH visitors and 54% amongst non visitors generally)
- **High level of interest in visiting the redeveloped PSH** (89% interested or very interested) with a significant proportion (63%) stating very interested, more so than non visitors generally, this group is highlighted as a particular non visitor segment within reach for the redeveloped PSH
- Majority viewed the redevelopment of PSH as important within the wider Marischal Square redevelopment (65%) with results on a par with non visitors generally

3.7 PSH Non Visitors – ACC Non Visitors (n=121)

This section focuses on the survey results from non visitor type two, those who have never visited PSH and those who have not visited any other ACC attraction in the past 12 months (q10). Defined by its low rate/irregular engagement with ACC this segment is anticipated to be the 'most hard to reach' of all the audience groups considered. A total of 121 respondents were type two non visitors.

Results for this segment have been compared principally with non visitor type 1, those who have not visited PSH but have recently visited another ACC attraction, and non PSH visitors overall.

- Comparatively **high lack of awareness of PSH**, on a par with that of the young adult segment (48% unaware). This is cited as the main reason for not having visited. This segment also displays the **lowest level of awareness of other ACC attractions** (26% unaware of any), although, again, the highest awareness is of the Aberdeen Maritime Museum (72%)
- **Lower rate of recent engagement across all attraction types** than non visitors generally and, unlike the other segments particularly **low engagement with museums** (32%). More encouragingly for PSH however, **historic house/ castle/ property is the most visited attraction type** (58% had visited in the past 12 months). Most likely to visit other attractions with another adult (51%) or in a party which includes a child/children (41%), highlighting a sizeable **family audience** within this segment (greater than non visitors generally, 37%, and also non visitors type one specifically, 31%).
- Display a **moderate level of interest** in all proposed interpretive themes (weighted average score range 3.3-3.6, which is lower than non visitors generally and therefore considerably lower than non visitors type 1 who more closely mirrored interest rates amongst previous PSH visitors). Although not much variance between the themes overall, **'Provosts to Paupers'** emerged as the favourite (68% interested or very interested), followed closely by **'The Silver City Emerges'** (67%). This segment does however display a **relatively strong level of disinterest**, most comparable to young adults (range of 26%-28% somewhat/very uninterested)
- There was however a **high level of interest in the vast majority of proposed visitor experience elements** (weighted average score 3.9-4.5), although not as high as amongst non visitors type 1. Akin to the responses amongst previous PSH visitors and non visitors overall, improved accessibility and child friendly experience emerged as the most important elements (86% and 84% viewed as important/very important) followed by high quality displays (83%), largely consistent with the results for non visitors generally
- Majority interest in visiting the redeveloped PSH (69% interested or very interested), although lower than amongst non visitors generally (78%) and recent ACC visitors specifically (89%)
- Slight majority belief that the redevelopment of PSH is important to the redevelopment of Marischal Square (53%), lower than amongst non PSH visitors generally (59%)

3.8 Significance for PSH

The segmentation analysis provides further encouragement regarding the audience development potential of the redeveloped PSH. Across the segments there is majority interest in visiting, moderate to high interest in all proposed themes and moderate to high importance placed on all proposed visitor experience elements. The fact that the results pertaining to interpretive themes and visitor experience elements do not vary widely between the segments is positive from a resources allocation perspective meaning that resources will not have to be spread thin and wide in order to enhance engagement with different audience groups.

Levels of interest and support are greatest amongst segments which can be considered most actively engaged (either with PSH itself, other ACC attractions and/or other cultural/heritage attractions). This includes Lunchbreak Concert goers, Non PSH Visitors (type 1), and Families. However, other audiences, which perhaps may appear 'harder to reach' on first sight are certainly not 'out of reach' for PSH. This includes Aberdeen Leisure Visitors, Young Adults and Non PSH Visitors (type 2 – those who have not recently engaged with another ACC attraction). Whilst attracting such groups may be more challenging, it is certainly conceivable for the redeveloped PSH.

Lack of awareness is the overarching existing barrier to engagement. Although a promotional campaign associated with the redevelopment will assist address this, issues concerning the presence of PSH within the wider Marischal Square redevelopment are again highlighted as a potential concern area.

Subtle differences in the opinions towards interpretive themes and visitor experience elements highlight specific hooks for specific audiences in addition to those evident across the sample overall. These are summarised below:

- Whilst 'Provosts to Paupers' emerges as the top theme overall, it is particularly popular amongst Families, Young Adults, Lunchbreak Concertgoers and Non PSH Visitors Type 1
- 'Secrets in Stone' is particularly popular amongst Aberdeen Leisure Visitors but also Families, Lunchbreak Concertgoers and non PSH Visitors Type 1
- 'The Silver City Emerges' is popular amongst all groups
- 'Land Beyond the Mountains' is particularly popular amongst Aberdeen Leisure Visitors and Non PSH Visitors Type 1

Similarly some segments stress the importance of some elements of the visitor experience more than others. These are as follows:

- Guided tours are particularly important for Aberdeen Leisure Visitors and Non PSH Visitors Type 1
- A child friendly experience is particularly important amongst Families and Non PSH Visitors Type 1
- Temporary exhibitions are particularly important amongst Aberdeen Leisure Visitors
- Although not the most important aspect, contemporary art displays are comparatively important to Young Adults

The level of awareness of and recent engagement with the Aberdeen Maritime Museum in particular emphasises the opportunity for audience sharing. This again raises the potential for cross-promotion and joint activities and events.

Finally, despite the varying levels of awareness and engagement with PSH, all but one of the segments express a majority view regarding the importance of PSH to the wider Marischal Square redevelopment.

3.9 Comparison With Aberdeen Art Gallery

During the development phase of the Aberdeen Art Gallery & Cowdray Hall redevelopment, Jura Consultants assisted ACC to develop an Activity Plan in support of the subsequently successful Heritage Lottery Fund application. A core component of this work was developing an audience development strategy drawing from visitor and non visitor research. The following points compare the findings of the AAG and PSH research highlighting any particular points of relevance for PSH audience development opportunities.

- A considerable proportion of both AAG and PSH visitors are local residents
- AAG's temporary exhibition programme was one of the main motivators amongst visitors (56%). With no temporary exhibition programme, this places the emphasis on other activity programming to maintain awareness and attract repeat visits at PSH, particularly amongst the local market and special interest groups
- As Aberdeen City's headline attraction with collections of a national and international significance, AAG has a strong appeal amongst tourists looking to visit 'tick the box' attractions. Cross-promotion, joint promotion and sharing collections could be an effective means to signpost PSH from AAG and place PSH more firmly on the tourist agenda
- One of AAG's core audience segments includes Leisure Visitors who frequent the gallery as a place to socialise/meet friends rather than visiting principally for the gallery or collections. With the removal of the café, PSH may lose its immediate appeal amongst this segment. However, development of the surrounding area as a civic space as part of the PSH development may encourage use of this type from which conversion to house visits may be achievable.
- School groups are a key segment for AAG and will also be important for PSH. However, the lack of facilities sought by the majority of school groups emphasises the need for package education visits with other ACC venues, such as AAG or the Aberdeen Maritime Museum, to be made available. Ensuring that the displays and interpretation allow the necessary circulation space for larger groups within the rooms themselves at PSH is also an important consideration.
- Akin to PSH, a target development segment for AAG is families with children. AAG has devised a strong family activity programme in order to enhance the gallery's appeal.
- Increasing engagement with students is a focus area for AAG. PSH may be able to offer opportunities that would also appeal, again highlighting the role of activity programming
- Audiences with mobility issues are a particular challenge for PSH on account of access barriers above the ground floor. Whilst PSH is unlikely to be in a position to deliver an outreach programme on the scale that is being pursued by AAG, opportunities for interpreting the upper floors both within the ground floor spaces and online could be considered.

Overall, data demonstrate the significance of activity programming for audience development, particularly where, as is the case with PSH, there are considerable accessibility challenges and limited opportunity to offer dedicated visitor facilities and spaces which typically appeal to particular audience groups. Identifying

how PSH can work with ACC's existing assets in this respect is also key to maximising audience development opportunities.

4.0 MARKET APPRAISAL

4.1 Introduction

This section provides an assessment of the potential visitor market for the redeveloped PSH. The principal markets include local resident, day trip and tourist. Analysing the size of these respective markets provides a benchmark against which the historic performance of PSH can be assessed and forms a basis for forecasting the visitor market potential. The motivations and behaviour of visitors are also considered. This highlights the opportunities for the project to target specific markets. The section includes a competitor analysis this is another important step in this benchmarking process highlighting any gaps which could potentially be addressed by the redeveloped PSH in order to increase its share of the market.

4.2 Market Size

Local

The local market is defined as those living within a 30 minute drive time of PSH. This includes all of Aberdeen City (population approximately 227,000) and a portion of Aberdeenshire (population approximately 107,000) to produce a total local market of **approximately 334,000**.

Data is drawn from *statistics.gov.scot* and pertains to 2013 mid year estimates. Details of all ward populations within the local market are provided at Appendix B.

Day Trip

It is considered reasonable that PSH could draw a day trip market from the population within a 31-60 minute drive time. The day trip market spans Aberdeenshire and Moray. With a population of **approximately 156,000**, PSH is served by a relatively modest day trip market

Data is drawn from *statistics.gov.scot* and pertains to 2013 mid year estimates. Details of all ward populations within day trip market are provided at Appendix B.

Tourist

Tourists are defined as those who stay overnight for at least one night. The table below presents the volume of tourist visits to Aberdeen & Grampian during 2014 comparing this to total tourist visits to Scotland overall.

TABLE 4.1 ABERDEEN & GRAMPIAN TOURIST TRIPS 2014					
Origin	Aberdeen & Grampian		Scotland		A&G as % of Scotland
	No. of Trips	%	No. of Trips	%	
GB	1,228,000	79%	12,520,000	82%	9.8%
Overseas	323,000	21%	2,700,000	18%	12.0%
Total	1,551,000		15,220,000		10.2%

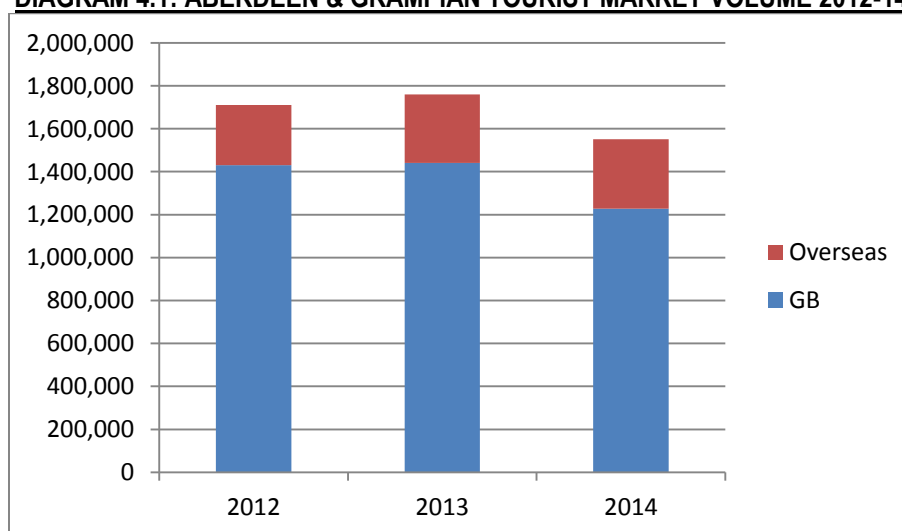
Source: VisitScotland, Tourism in Scotland's Regions 2014

In 2014 there were a total of approximately 1.56m tourist visits to Aberdeen & Grampian. This was comprised largely of visits by domestic visitors from Great Britain (approximately 79% compared to 21% of visits by overseas audiences). The composition of the Aberdeen & Grampian tourist market is consistent with that for Scotland.

Of Scotland's total tourist market, the Aberdeen & Grampian region constitutes approximately 10.2%. This positions Aberdeen & Grampian as the fifth most visited out of the 16 former VisitScotland regions behind Edinburgh & Lothians, Greater Glasgow and Clyde Valley, Highlands & Islands and Argyll, the Isles, Loch Lomond, Stirling and Trossachs (ALLST).

As demonstrated in the graph below, the Aberdeen & Grampian tourist market experienced a decline in 2014 (by approximately 11.8% compared to 2013). Despite the overall decline in tourist visit volume, the proportion of overseas tourists has however increased rising from 16.4% of total visits in 2012 to 20.8% in 2014.

DIAGRAM 4.1: ABERDEEN & GRAMPIAN TOURIST MARKET VOLUME 2012-14



Source: VisitScotland, Tourism in Scotland's Regions 2012, 2013, 2014

Market Size Summary

As summarised in the table below, the total potential market for PSH is **approximately 2.04 million**. This is comprised largely of the tourist market (approximately 76%).

TABLE 4.2 MARKET SUMMARY	
Market	Population
Local	334,000
Day Trip	156,000
Tourist	1,551,000
Total	2,041,000

4.3 Tourist Visitor Profile

The box below summarises key profile, motivation and behaviour data relating to the Aberdeen & Grampian tourist market. All data is drawn either from *VisitScotland, Scotland Survey 2012, Aberdeen & Grampian Factsheet* or *VisitScotland, Tourism in Scotland's Regions 2014*. Full data tables and graphs are presented at Appendix B.

Origin

- The Aberdeen & Grampian tourist market is dominated by domestic visits (79%). Domestic visitors are principally those from Scotland (64%) or from England (35%). This represents a higher proportion of domestic visits from Scotland than reflected in the national trends (52%).
- Overseas visitors include a sizeable proportion from Norway (16% compared to 5% across Scotland overall). The particularly close proximity between Aberdeen and Norway explains this. Other overseas nations with considerable representation include Germany (13%), USA (9%) and France (8%). There are proportionately fewer visits by tourists from the USA than to Scotland overall (15%). This is of significance given that the contribution of USA tourists in terms of visitor spend is proportionately greater than their visit volume by some way (9% of tourist visits to Aberdeen, yet 21% of all tourist spend; 15% of all tourist visits to Scotland, yet 24% of total tourist spend).

Trip Duration

- The average tourist trip duration is 3.3 nights which is consistent with that across Scotland overall.

Trip Purpose

- A majority of tourist visits are made as a holiday (55%) although this is proportionately considerably less than across Scotland (71%). The greater proportion of business visits, most likely linked with Aberdeen's oil industry, accounts for this (33% in Aberdeen & Grampian compared with 16% across Scotland). Of all holiday tourist visits to Scotland, 7.9% are made to Aberdeen & Grampian. This places Aberdeen & Grampian on a par with Perthshire. Edinburgh & Lothians draws the greatest proportion of all tourist visits (28%).

Visit Type & Reason for Visit

- A relatively modest volume of visits made to the region include a stay in a city (21%), of which an even smaller proportion were staying in a city to visit city attractions (9%). Whilst this is symptomatic of the fact that the results are for the Aberdeen & Grampian region, it demonstrates the strength of appeal of the countryside in contrast to the urban areas of the region. This point is furthered by the fact that a particular interest in scenery is the top reason tourists typically choose to visit the region (28%). Visiting a particular attraction was the fifth top reason (17%). This suggests that the average trip duration is most likely attributable to a greater proportion of nights spent outwith the City of Aberdeen.

Activities Participated In

- The most popular activity is visiting an historic venue (53%) which indicates that, whilst the scenery may be the top reason for a visit, once there tourists are inclined to visit attractions – specifically of the type which PSH is categorised. Tourists engage in a wide range of other activities with the top 5 also including a short walk/ stroll (51%), shopping (47%), sightseeing (46%), visiting a museum / art gallery (45%). Visiting cities themselves was 9th most popular (39%).

Significance for Provost Skene's House

Aberdeen & Grampian's relatively modest share of Scotland's tourist market together with the tendency amongst tourists to visit whilst touring the country or base their holiday in the countryside highlights a relatively limited tourist market pool from which Aberdeen City Centre attractions are competing to attract. This is further emphasised by the fact that the top reason for choosing to visit the region is due to an interest in the scenery.

Encouragingly for PSH however, one of the most popular activities once in the region is visiting an historic venue. Other particularly popular activities are also readily accessible from PSH owing to its city centre location. This includes three other museum/ art gallery attractions all run by Aberdeen City Council as well as shopping and general sightseeing opportunities. This highlights a potential opportunity to promote a visit to PSH as part of a day out in Aberdeen which can be combined with a variety of other popular leisure time pursuits and in doing so increasing the overall appeal of a city based holiday visit. ACC's aspiration to encourage visitors to conceive of PSG, the Aberdeen Maritime Museum and the Tolbooth Museum as a package of attractions each exploring the city's heritage from a different perspective would further emphasise the position of PSH within a strong portfolio of city based heritage attractions.

4.4 Competitor Analysis

4.4.1 Tourist Attractions By Type (Scotland)

Visit Volume

The table below presents the volume of visits attracted by the different attraction types across Scotland. PSH falls into the historic houses/ palaces category. Attraction categories are ranked in terms of 2015 visit volume. Note that data pertains to all attractions which submitted visit data to the Moffat Centre and may not therefore include all attractions in Scotland.

TABLE 4.3 VISIT VOLUME BY ATTRACTION TYPE					
Attraction Type	Sample (2015)	Visits 2014	Visits 2015	% Change	Avg 2015
Outdoors/ Nature Attractions	99	20,225,460	20,182,103	-0.20%	203,860
Museums/ Art Galleries	254	14,114,576	14,666,771	3.90%	57,743
Castles/ Forts	59	3,704,570	3,973,265	7.30%	67,343
Wildlife/ Animal Attractions	35	2,647,458	2,684,444	1.40%	76,698
Gardens	35	2,191,381	2,205,372	0.60%	63,011
Scottish Crafts/ Retail Attractions	10	2,054,880	2,193,708	6.80%	219,371
Places of Worship/ Spiritual Attractions	26	2,003,905	2,084,570	4.00%	80,176
Other Historic Properties	57	1,881,275	1,906,781	1.40%	33,452
Activity Attractions	10	1,727,647	1,722,032	-0.30%	172,203
Historic Houses/ Palaces	48	1,478,417	1,501,660	1.60%	31,285
Heritage Centres	23	1,476,680	1,409,186	-4.60%	61,269
Transport-Related Attractions	10	1,254,640	1,381,992	10.20%	138,199
Distilleries/ Breweries/ Wineries	43	1,218,879	1,296,698	6.40%	30,156
Industrial/ Workplaces	11	387,032	384,799	-0.60%	34,982
	720	56,366,800	57,593,381	2.20%	

Source: Moffat Centre, Visitor Attraction Monitor 2015

Historic houses/ palaces ranked 10th out of the 14 attraction categories. From 2015 to 2016 historic houses/ palaces achieved a growth in visit volume by +1.6%, although this was less than the average growth across Scotland (+2.2%). The greatest growth per attraction category was achieved by transport related attractions (+10.2%, although sample size is small) and by castles/ forts (+7.3%).

In terms of average visit volume per attraction included in the sample, historic houses/ palaces attracted approximately 31,300 visits in 2015. This was the second lowest average visit volume per attraction behind distilleries/ breweries/ wineries (approximately 30,200 visits).

This data suggests a certain degree of challenge for historic houses/ palaces across Scotland generally in attracting visitors.

In the context of the performance of historic houses/palaces in 2015 and based on its average visit number from 2009-2012 (approximately 55,000 visits per annum), PSH would have been the ninth most visited. This would have placed it above Argyll's Lodging in Stirling (50,326 visits) and just below Pollok House in Glasgow (56,025 visits). Interestingly, all of the top 10 historic house/ palace attractions are paid admission. PSH is therefore unique in its position as free to enter. See Appendix B for full data.

Visitor Type

The table below presents the split in terms of visits by adults and children across each visitor attraction category. Unsurprisingly, distilleries/ breweries/ wineries attract the greatest proportion of adults (approximately 96%). Historic houses/ palaces however attract the second greatest proportion of visits by adults (approximately 87%), and therefore a particularly low proportion of child visits (approximately 13%). Interestingly, this proportional split is not dissimilar to castles/forts with 15% of visits by children. Attractions which have the greatest proportion of child visits are activity attractions and wildlife/ animal attractions (approximately 39% and 33% respectively).

TABLE 4.4 ADULTS : CHILDREN BY ATTRACTION TYPE			
	Sample	% Adults	% Children
Activity Attractions	6	61	39
Castles/Forts	12	85.4	14.8
Distilleries/ Breweries/ Wineries	33	95.5	4.5
Gardens	16	80	20
Heritage Centres	12	77	23
Historic Houses/ Palaces	16	87.2	12.8
Industrial/ Workplaces	4	78.8	21.3
Museums/ Art Galleries	143	77.7	22.5
Other Historic Properties	21	80.1	19.9
Outdoors/ Nature Attractions	31	68	32
Places of Worship/ Spiritual Attractions	15	85.3	14.7
Scottish Crafts/ Retail Attractions	6	88	12
Transport-Related Attractions	6	75.3	24.7
Wildlife/ Animal Attractions	21	66.8	33.2
<i>Source: Moffat Centre, Visitor Attraction Monitor 2015</i>			

This data perhaps suggests that historic houses are not typically perceived as overtly appealing to children. However, with the importance of a child friendly experience stressed by consultees and the fact that the family segment specifically displayed an interest in visiting the redeveloped PSH bodes well for the potential PSH to appeal to this audience, if a suitable child friendly experience is delivered.

4.4.2 Aberdeen & Grampian Competitors

Visit Volume

Analysis of the top visited attractions regionally (Aberdeen & Grampian) and locally (Aberdeen City) was performed, see Appendix B for data.

From this the following key points are drawn:

- Data pertains to 2015 and as such excludes Aberdeen Art Gallery (AAG) which closed to the public for renovation during this year. AAG is typically the second top visited Aberdeen City Attraction and roughly the region's fourth most visited (approximately 150,000-180,000 visits)
- On the basis of 2015 visit figures, PSH (with a visit volume range of approximately 53,000-67,000 visits) would sit mid table in the region's most visited attractions and fourth in terms of Aberdeen City attractions (assuming AAG is also factored)
- Including AAG, there are typically only five Aberdeen City attractions within the region's top 20 visited attractions
- Focusing on Aberdeen specifically, there were only eight attractions which shared visit number data with the Moffat Centre. With a cumulative total visit volume of approximately 456,000 visits (excludes Aberdeen Art Gallery) this is a modest attraction visiting market
- On the other hand, this does however demonstrate a lack of immediate competition for PSH and the opportunity for it to draw an increased visit volume as a result of the redevelopment

This further substantiates the observation concerning the draw of Aberdeenshire over the City amongst tourists to the region and emphasises both the need and challenge in drawing visitors to the City. On one hand this indicates a limited pool of potential visitors from which the redeveloped PSH will have to draw from. However, on the other hand, the lack of significant competition highlights the potential for PSH to achieve a considerable penetration of those existing visitor markets as a result of the redevelopment. Further, owning three of what are typically the top 5 visited City attractions (AAG, Aberdeen Maritime Museum and PSH), again highlights the opportunity for the ACC museums to be marketed as a package together demonstrating the wealth of heritage available to explore within the city.

Seasonality

As presented in the table below, Aberdeen & Grampian visitor attractions experience a similar pattern of seasonality to Scottish visitor attractions generally. The majority of visits (61%) are made during Quarters 2 or 3. This represents a more balanced seasonality than that typically encountered by historic house attractions across Scotland where Quarter 1 visit volume is considerably lower proportionately (6% compared to 14% across Aberdeen & Grampian). This suggests the benefits of a city centre location for a historic house experience.

TABLE 4.5 SEASONALITY 2015			
Quarter	Aberdeen & Grampian Attractions (sample = 69)	Historic Houses/ Palaces (sample = 25)	Scotland Attractions (sample = 520)
Jan - Mar	14%	6%	16%
Apr - Jun	31%	32%	30%
Jul - Sep	38%	51%	36%
Oct - Dec	16%	11%	18%
<i>Source: Moffat Centre, Visitor Attraction Monitor 2015</i>			

Retail and Catering Spend

It is understood that the redeveloped PSH will include a small shop and exclude a café. The table below displays the average retail and catering spend per visit at comparable attraction categories, with the latter included for comparison purposes.

At £2.94, historic houses/ palaces typically generate the greatest average retail spend per visit of the three categories. Free attractions across Scotland typically generate the least (£1.15) with Aberdeen & Grampian attractions sitting between the two (£1.83). Average retail spend per attraction is determined by visit volume of the contributing sample and ranges from £40,560 (Aberdeen & Grampian attractions) to £173,751 (historic houses/ palaces).

The position and prominence of retail within the PSH visitor journey and the quality and range of stock will influence what should be considered a benchmark spend per head. A benchmark on a par with free attractions Scotland would be prudent for the purposes of business planning at this stage.

TABLE 4.6 RETAIL & CATERING SPEND						
	Retail			Catering		
	Sample	Avg. Spend Per Visit	Avg. Spend Per Attraction	Sample	Avg. Spend per Visit	Avg. Spend Per Attraction
Free Attractions Scotland	71	£1.15	£151,600	27	£0.47	£131,097
Historic Houses/ Palaces	17	£2.94	£173,751	11	£2.77	£212,743
Aberdeen & Grampian	24	£1.83	£40,560	7	£1.99	£92,965
50,000 - 99,999 Visits p.a	31	£2.36	£162,452	23	£2.05	£148,144
<i>Source: Moffat Centre, Visitor Attraction Monitor 2014</i>						

With a range of £0.47 to £2.77 across the three categories, it is apparent that typically across the sector higher spend per head can be generated from retail rather than catering. Of course, key factors such as café offer and quality, volume and quality of the competition, position within the visitor experience, catering setting and ambiance, attraction dwell time and cost of sales will all influence the success of a café operation. With the inclusion of catering chains within the Marischal Square redevelopment, a café at PSH would face considerable competition within the immediate vicinity which is a significant threat in terms of

achieving the upper levels of catering spend presented above. Further, there would also be considerable additional staff costs and other operating costs associated with a café which would impact on the profit achieved. A retail facility could be efficiently combined with a welcome/reception space and in doing so minimise staff resource required.

Of course, many attractions include both café and retail facilities. For PSH the challenges associated with accessibility would require both facilities to be located on the ground floor and, in consequence would remove almost all exhibition from the only fully accessible floor. This is not advantageous from an audience development potential.

4.4.4 Corporate Hire

Aberdeen City has an abundance of corporate hire venues. This includes purpose built facilities, such as Aberdeen Exhibition and Conference Centre (AECC); hotels with dedicated conference facilities located in the city centre and outskirts; and historic and cultural venues offering customised conference packages, such as the Beach Ballroom and Pittodrie Stadium as well as AAC's own Aberdeen Art Gallery, Cowdray Hall, the Aberdeen Maritime Museum and the Tolbooth Museum. Most venues can accommodate a range of meeting sizes and typically provide catering options.

Any use of PSH for meetings and other corporate events would have to take place in one of the historic rooms spaces available to the public or potentially in the cellar space as was previously available. This raises issues over security as well as the impact on quality of visitor experience if a hire is required during visiting hours. Moreover, the accessibility challenges will be a considerable barrier for a number of groups. The lack of café facility will also reduce its appeal and ability to generate income from the higher revenue conference events. The core appeal of holding a meeting or event at PSH is the unique appeal of the heritage asset. AAG and the Aberdeen Maritime Museum also hold this appeal and are much better suited to hosting such events. Should a particular interest be expressed in holding an event where none of the above issues are encountered, PSH should certainly be made available. Corporate hire should not however be viewed as a significant income generating channel or main focus for any marketing campaigns.

4.5 Key Messages

- Whilst the region overall is served by a sizeable tourist market, Aberdeenshire currently has a greater draw amongst tourists than the City. There is currently a lack of both volume and variety of attractions in the City which may be a contributing factor. This highlights a limited pool of tourists from which the redeveloped PSH will have to draw from, however, with a lack of immediate competition in terms of an historic house experience and the opportunities to share audiences across ACC's attractions (including Aberdeen Art Gallery anticipated to enhance the draw of Aberdeen considerably) highlights the potential for PSH to achieve a considerable penetration of that existent market.
- The tourist market is dominated by domestic tourists
- Aberdeen City is served by a considerable local market. PSH is currently well loved and well visited by local residents. Retaining their loyalty is important for encouraging repeat visits, particularly during quieter months when there are fewer tourists in the area. This raises the importance of changing elements of the exhibition/ activity/ events programme, particularly with the absence of a café to draw repeat visits.
- The day trip market is modest, much of which is located in closer proximity to other popular historic properties in Aberdeenshire as opposed to PSH.
- The market data highlights some challenge faced by historic houses generally across the sector in terms of visit number growth and in their appeal to the family audience. The level of interest in visiting the redeveloped PSH does however provide some optimism in terms of PSH's ability to appeal to a broader audience, the family market in particular. This emphasises the significance of a family friendly experience.
- Average retail spend per visit across the sector is typically higher than average catering spend per visit. Whilst the success of both retail and catering is dependent on a variety of factors the catering competition within the immediate vicinity and typically high costs associated with staff and other operations render retail a more attractive option for PSH.
- With an abundance of venues offering dedicated conference facilities and the flexibility to provide bespoke packages, including various historic properties, corporate/events hire is not considered to be a significant revenue generator for PSH

5.0 COMPARATOR ANALYSIS

5.1 Introduction

This section presents the key findings drawn from an analysis of comparator historic properties. Properties selected for consideration included historic houses located in a similar urban environment and those which deliver a differentiated visitor experience from the conventional historic house experience. This could include the way in which the rooms are presented or interpreted and/or the activity programming delivered. The following comparators were considered:

- Bronte Parsonage Museum, Haworth, West Yorkshire
- Denis Severs' House, Spitalfields, London
- Drum Castle, Aberdeenshire
- Sir Walter Scott's House, Abbotsford, Scottish Borders
- Argyll's Lodging, Stirling

Key points of relevance from each comparator are presented in the sections below.

5.2 Bronte Parsonage Museum

- Comprises a combination of 10 period rooms set as if being used by the Bronte family and also an Exhibitions Room displaying and interpreting items from the Bronte Collection in a contemporary museum exhibition manner
- Delivers a contemporary arts programme showcasing new responses to the Bronte and the Parsonage Museum collection from established writers and artists and a vibrant activity programme. A recent programme included 6 new piano pieces (each inspired by a room in the parsonage) adding an additional layer to the interpretation within the historic house environment.
- Retail range includes a significant proportion of items relating to the Bronte sisters
- There is no cafe
- Adult admission: £7.50

5.3 Dennis Severs' House

- House comprises 10 rooms that chart moments in the life of the fictitious Jervis family as they work as silk weavers between 1725 and 1919. Each room features a different historic style and is laid out as if the occupants had just left, possibly after being interrupted by the visitors themselves. Interpretation is designed to encourage visitors to immerse themselves in the lives of the fictitious characters. Visitors are encouraged to use their senses to piece together the scene prior to it being abandoned by the occupants participating in an imaginary journey through time
- Entry is by guided tour only

- Visitor facilities include a shop selling books, DVDs and gift vouchers; there is no café
- Adult admission: £10

5.4 Drum Castle

- Drum Castle is a 13th century castle located in Aberdeenshire, approximately 40 minutes drive from the centre of Aberdeen. Owned by the National Trust for Scotland the site includes the castle and surrounding gardens and arboretum
- Since introducing a new gallery space in 2015 visit numbers have increased significantly demonstrating the appeal and draw of contemporary art in an historic house setting
- The gallery space is currently host to Northern Lights, a specially curated contemporary art exhibition comprising work on loan from Aberdeen Art Gallery. The exhibition was launched in April 2016 and runs to March 2017
- Exhibition entry is included within castle admission (£12.50 per adult)

5.5 Abbotsford House

- The home of Sir Walter Scott, Abbotsford House presents 8 rooms and corridors maintained as they were in Scott's time, with limited interpretation. A ninth room (once Scott's breakfast room and study) is now an exhibition room with exhibitions showcasing different aspects of Scott's life.
- Complementary audio tours are available with three tour options including a factual tour, tour voiced by an actor playing Sir Walter Scott and tour voiced by Sir Walter Scott's cat and dog. The audio tour offers layered interpretation allowing the visitor to select standout objects as well as others of their particular interest
- Entry to the house itself is by paid admission (£8.95 per adult) as is the surrounding gardens (£3.60 per adult for gardens only). There is also a free to enter visitor centre with permanent exhibition introducing Scott, his works and their significance conveyed through a combination of artefacts, interpretive panels, audio visual and touch screen interactives. The visitor centre features a café/restaurant and shop.
- In 2015 Abbotsford House (the paid for experience) attracted approximately 60,000 visits. The international renown of Sir Walter Scott and the House's focus on his life and works is undoubtedly a key draw. Abbotsford House is the top visited paid for attraction in the Scottish Borders.

5.6 Argyll's Lodging

- Owned by Historic Environment Scotland, Argyll's Lodging is promoted as Scotland's most splendid and complete example of a 17th century townhouse. Located on the approach to Stirling Castle, admission is available only with a castle admission ticket and is by guided tour only. Admission is included in the standard Stirling Castle ticket (£14.50 per adult). It is open daily however hours are limited to 1-4pm.

- Attracting 50,326 visits in 2015, Argyll's Lodging was the 9th most visited historic house/ palace attraction in Scotland (see Appendix B), clearly benefitting significantly from incorporation within the visitor experience of one of Scotland's highest profile and most visited attractions.

5.7 Key Messages

- The Bronte Parsonage Museum and Abbotsford House effectively demonstrate how a set room historic house experience can be combined with museum exhibition space allowing the opportunity for a variety of interpretive themes to be explored and employing a variety of interpretive methods without interrupting the authentic feel of the historic house experience
- Dennis Seavers' House demonstrates how the interpretive boundaries can be pushed within the historic house experience encouraging a multi-sensory immersive experience
- The Bronte Parsonage Museum and Drum Castle illustrate how effective integrating contemporary art into the historic house experience can be, creating a juxtaposition that affords new insights and perspectives to be explored. The former in particular demonstrates how art and music can be integrated within the historic house experience without necessarily requiring a dedicated exhibition space. This is particularly interesting for PSH where there is unlikely to be any dedicated education/activity or temporary exhibition space. The survey data indicates an interest in contemporary art and programmes such as this would offer a new dimension to the visitor experience which may also encourage repeat visitation
- Sir Walter Scott's House demonstrates how effectively an audio tour can be used to interpret the historic house cleverly offering a range of perspectives from which the tour can be enjoyed as well as opportunities to delve deeper interpretively as befits their own interests and requirements
- Although a component part of one of Scotland's most visited paid for experiences, Argyll's Lodging demonstrates the benefits of cross promotion and audience sharing, approaches available to ACC in presenting its own museums and galleries as a suite of attractions

6.0 VISITOR MARKET POTENTIAL

6.1 Introduction

This section quantifies the visitor market potential of PSH. Visit number projections draw from the consultation findings, market assessment and comparator analysis presented in previous sections of this report. Projections have also been considered in relation to the emerging exhibition and design proposals developed by Studioarc ensuring that the redevelopment will provide a visitor experience capable of drawing the volume of visits our market and audience research highlight as feasible.

6.2 Current Performance

As presented in Section 1, the average number of visits to PSH over its last three full years of operation was approximately 55,000. This includes café visits. Given that a permanent café is currently not anticipated to feature in the redeveloped PSH it is necessary to take account of the café factor in order to identify a comparable baseline from which the projections can be based.

The survey research and anecdotal information from ACC highlights the significance of the café as driver of visits in its own right, with many visitors observed as purely visiting for the cafe. Our survey data highlights that for 21% of previous visitors the café was the main reason for their most recent visit to PSH. As previously highlighted, our visitor sample is dominated by local residents. The café is likely to be a more significant driver amongst repeat visitors from the local market as opposed to first time visitors from the day trip and tourist markets. In order to not overstate the draw of the café we have applied a café factor of 15% to the average PSH visit number producing a **3 year average exhibition motivated visit volume of approximately 47,000 p.a.**

Section 1 presented the Aberdeen Maritime Museum as the closest ACC venue to PSH in terms of visit volume. The consultation and market appraisal also highlighted the opportunity for audience sharing with other ACC venues generally, but the Aberdeen Maritime Museum specifically. The Aberdeen Maritime Museum also has a café and therefore it is important to again consider the café factor in order to arrive at a comparable benchmark. Applying the same café factor produces a 3 year average exhibition motivated **visit volume of approximately 64,000 to the Aberdeen Maritime Museum p.a.**

6.3 Visit Number Projections

The following table presents a penetration rate analysis for visits to the redeveloped PSH. The penetration rate analysis is an indicative rather than predictive tool which can show the level of visitor market penetration required to achieve certain levels of performance. The penetration rate analysis explores three different scenarios (low, mid and high) enabling consideration of the impact on visit numbers of more/less

favourable market conditions and other influencing factors described more fully below. The figures are as follows:

TABLE 6.1 PSH VISIT NUMBER PROJECTIONS								
Market	Population	Penetration Rate			Repeat Visit Factor	Visit No. Projections		
		Low	Mid	High		Low	Medium	High
Local	334,000	3.75%	4.75%	5.75%	1.5	18,788	23,798	28,808
Day Trip	156,000	6.00%	7.00%	8.00%	1.0	9,360	10,920	12,480
Tourist	1,551,000	1.75%	2.00%	2.25%	1.0	27,143	31,020	34,898
Total	2,041,000					55,290	65,738	76,185

The mid level estimate is the long-term 'steady-state' and is designed to represent the 'floor' rather than the 'ceiling' for the redeveloped PSH. It is considered that PSH has the potential to generate in the region of **66,000 visits per annum**. This represents an uplift of approximately 40% on the baseline 3 year average visit volume of 47,000 (café factor applied) taking the performance of PSH to a level comparable with the Aberdeen Maritime Museum (café visits excluded). The projected mid estimate is comprised of 47% of visits by tourists, 36% of visits by the local market and 17% of visits by the day trip market.

The points below set out the key assumptions upon which achieving the mid level penetration rates are based. These have been discussed with Studioarc and their correlation with the emerging exhibition and design proposals confirmed. Assumptions include:

- A high quality, interactive child friendly visitor experience which renders PSH distinct from other historic house experiences and capable of drawing considerable proportions of the visitor market already within Aberdeen City will be created.
- Delivery of an activity programme capable of drawing an average of 1.5 repeat visits from the local market. Whilst there is to be no dedicated temporary exhibition programme as such, it is understood that spaces are to be made available for the display of outputs from community engagement activity and opportunities for delivery of programming within the rooms of the house (including those with an arts focus). Together with the high quality experience delivered in a free attraction, repeat visits of this level are considered feasible. Resource for activities is therefore an important factor.
- Cross promotion and audience sharing between ACC venues, the Aberdeen Maritime Museum in particular. Again an activities programme which links the ACC venues offering, for example, trails between the attractions, will heighten the opportunity for audience sharing and again encourage repeat visitation from the local market in particular
- Increased footfall to Marischal Square on account of the wider commercial redevelopment. Maintaining a presence for PSH within this development is crucial to capitalise on this increased footfall raising the importance of signage, visibility and promotion.

The 'high' scenario of 76,000 visits per annum illustrates the visit volume which could potentially be achieved in the event of more favourable market conditions and other influencing factors as summarised below:

- Enhanced presence and visibility within Marischal Square to include associated landscaping works and external environmental interpretation in the immediate vicinity
- Increased opportunities for activity and events programming as a result of the associated civic space within the vicinity. This could include, for example, use of a landscaped area surrounding PSH as a venue for popular events such as Aberdeen Festival of Light
- Introduction of a pop-up catering kiosk/trolley in the associated civic space during the summer months
- Impact of the re-opening of Aberdeen Art Gallery enhancing the profile and draw of Aberdeen amongst day trip and tourist markets

The high scenario represents a +63% uplift on the current baseline performance and would take the performance of PSH to a level comparable with the Aberdeen Maritime Museum (when café visits are included). For prudent business planning, we recommend the mid level estimate of 66,000 visits per annum is applied. Whilst in some years the high scenario may be achieved, at this stage there is a degree of uncertainty regarding the key factors which would contribute to this.

In the context of the performance of historic houses/ palaces across Scotland during 2015, the mid scenario visit volume would place PSH on a par with Linlithgow Palace (currently the fifth most visited attraction of this nature in Scotland) and maintain PSH's position as the only free to enter historic house/ palace attraction in the top 10. See Appendix B for data.

6.4 Daily Capacity

On the basis of the mid scenario, indicative peak day visit number projections have been estimated. This will assist in identifying any potential visitor management implications of the uplift in visit volume, particularly regarding areas within the visitor experience where queuing may occur. Although not within the scope of this study, such analysis can also assist in decision making regarding opening hours.

Without the aid of existing daily or monthly visit number data for PSH, estimates have been based on the seasonality trends identified in the market appraisal pertaining to Aberdeen & Grampian attractions generally. It must be stressed therefore that all calculations are indicative and designed to highlight any potential related issues for consideration.

In 2015, 38% of all visits to Aberdeen & Grampian attractions who submitted data to the Moffat Centre were made during Quarter 3 (July – September). This equates to approximately 8,360 visits per average month per Quarter 3. This should be viewed as a minimum rather than maximum average peak month visit volume.

Daily capacity calculations assume that operating hours at PSH mirror the Aberdeen Maritime Museum (open 7 days per week from 10am-5pm Mon – Sat and from 12-3pm Sun). It has been assumed that 50% of all visits are made during the weekend and the remaining 50% made during weekdays and that a greater proportion of weekend visits are made on a Saturday (owing to reduced opening hours on a Sunday). On this basis approximately 680 visits are anticipated on the average peak month Saturday and 366 visits on the average peak month Sunday.

Assuming a peak visiting period of 3 hours per weekend day, **the average visits per peak hour during the average peak month is approximately 136 visitors on a Saturday and 122 visitors on a Sunday.**

TABLE 6.2 PEAK DAY CAPACITY ANALYSIS			
Criteria	Assumption	Visit Number	
High Season (Q3) Visit No	38% of all visits made during Q3	25,080	
Maximum Visits Per Avg Month During High Season	3 months during high season	8,360	
Weekend Visits	Open 7 days per week, 50% of all visits made on a weekend	4,180	
Avg visits Per Avg Q3 Weekend	4 weekends per month	1,045	
		Sat	Sun
Sat: Sun Split	65% of all visits made on a Sat; 35% Sun	679.3	365.8
Avg Visits per Open Hour	Sat: 10am - 5pm Sun: 12 - 3pm	97.0	121.9
Visits in Peak Period	60% of all visits made during peak period	407.6	121.9
Avg. Visits per Peak Hour	3 peak hours	135.9	121.9

PSH was previously closed on a Sunday. Should this operation continue, the peak day visit number would be greater than that presented above with further implications on issues such as visitor management, quality of visitor experience, health and safety etc. A more in depth analysis should be performed in order to more accurately understand the extent of these implications and alternative operating models explored before any decisions are made. This analysis would benefit from primary visit number data. This could potentially be collected at the Aberdeen Maritime Museum over the summer period.

6.5 Key Messages

- Achieving 66,000 visits p.a. is considered an achievable outcome for PSH. This represents an uplift of approximately 40% on the previous average performance when café motivated visits are excluded. This would render PSH comparable with the current performance of the Aberdeen Maritime Museum (when café motivated visits are excluded).
- A high quality visitor experience which reflects the interests and preferences of key audience segments, associated activity programming, presence and visibility within Marischal Square and cross promotion and programming with other ACC venues are key factors upon which this mid scenario projection is based.
- Achieving the high scenario of approximately 76,000 visits p.a. may be possible in the event that AAG significantly raises the profile and draw of Aberdeen City and associated landscaping works within the vicinity of PSH can be delivered within the remit of the redevelopment bringing with it enhanced visibility, more opportunities for activity programming and space for a small temporary catering facility
- Further consideration should be given to operating hours and the visitor management implications during peak days in the form of sensitivity analysis

7.0 CONCLUSION & RECOMMENDATIONS

7.1 Conclusion

This study has identified a strong market potential for a redeveloped PSH to increase both the volume and diversity of audiences engaging with PSH.

The consultation results demonstrate a high level of interest in and support for the redevelopment proposals. Whilst this is greatest amongst audiences most actively engaged with PSH, other ACC attractions and/or other cultural/ heritage attractions generally, other audiences which may appear 'harder to reach' are certainly not 'out of reach' for the redeveloped PSH. This is particularly positive from a resources allocation perspective enabling ACC to reach a wide variety of audience groups without spreading resources too thin and wide.

Subtle differences in the opinion towards interpretive themes and visitor experience elements highlight specific hooks for particular audiences in addition to those evident across the sample overall. Such elements could be effectively picked up through activity programming. The lack of temporary exhibition programming and dedicated facilities for education/activities emphasises the significance of an activity programme which can be delivered within the historic room spaces themselves akin to the approach adopted by some comparators.

Interpretive Themes	Visitor Experience Elements
Core Experience	
Provosts to Paupers Secrets in Stone The Silver City Emerges	Improved accessibility Child friendly experience High quality displays combining technology, objects, sound, smells and images
Additional Hooks – Potential Activities Focus	
Provosts to Paupers – Families, Young Adults, Lunchbreak Concertgoers, Non PSH Visitors Type 1 Secrets in Stone - Aberdeen Leisure Visitors but also Families, Lunchbreak Concertgoers and non PSH Visitors Type 1 Land Beyond the Mountains – Aberdeen Leisure Visitors, Non PSH Visitors Type 1	Guided tours – Aberdeen Leisure Visitors, Non PSH visitors generally (Type 1 specifically) Audio tours – Non PSH visitors generally Child friendly experience – Families, Non PSH Visitors Type 1 Temporary exhibitions – Aberdeen Leisure Visitors Contemporary art displays – Young Adults, Non PSH visitors generally

Lack of awareness is the overarching existing barrier to engagement. Although a promotional campaign associated with the redevelopment will assist to address this to some extent, issues concerning the presence of PSH within the wider Marischal Square redevelopment emerge as a potential area of concern.

PSH is clearly a much loved local asset, whether people have previously visited or not, and viewed as an important aspect of what is, for many local residents in particular, a highly contentious commercial development. Exploring opportunities for associated landscaping within the immediate vicinity and how this could be used to enhance the visibility and presence of PSH, used as a space for activity programming, and also satisfy a desire for some civic space should be considered.

Cross-promotion and audience sharing, achieved for example through partner activity programming, between PSH and other ACC's venue would also assist to address awareness barriers and introduce new audiences to PSH. Developing links between PSH and the Aberdeen Maritime Museum emerges as a key area of focus.

There is also an expectation that the redevelopment will feature a café. Whilst the market appraisal supports this decision, this expectation will have to be managed if the decision remains not to include one. Again, the opportunity to use any civic space in the immediate vicinity to position a pop-up café during the high season may be an attractive alternative.

The audience development potential of the redeveloped PSH is particularly encouraging in light of the challenges facing historic houses across the sector, particularly with regards to appealing to the family market. This further emphasises the significance of a family friendly experience within the core PSH experience. The fact that PSH is the only free to enter historic house/ palace attraction out of the top 10 most visited in Scotland is another important aspect of its draw.

It is our view that achieving approximately 66,000 visits per annum is an achievable outcome for PSH in what is currently a challenging Aberdeen City visitor market. This represents an uplift of approximately 40% on the previous average performance when café motivated visits are excluded, rendering its performance on a par with the Aberdeen Maritime Museum (excluding café visits). A high quality visitor experience which reflects the interests and preferences of key audience segments, associated activity programming capable of drawing repeat visits, presence and visibility within Marischal Square and cross promotion and programming with other ACC venues are key factors upon which this mid scenario projection is based.

Achieving the high scenario of approximately 76,000 visits p.a. may be possible in the event that the redevelopment of Aberdeen Art Gallery significantly raises the profile and draw of Aberdeen City amongst visitors and associated landscaping works within the vicinity of PSH can be brought firmly within the remit of the redevelopment bringing with it enhanced visibility, more opportunities for activity programming and space for a small temporary catering facility.

7.2 Recommendations

We recommend that the following points are considered during the continued development of the proposals for the redevelopment of PSH:

- Resource allocation for activity programming
- Joint promotional campaign and activity programming with other ACC venues, the Aberdeen Maritime Museum in particular
- Maintaining a presence for PSH within the Marischal Square redevelopment through signage, visibility and promotion and exploring opportunities for associated landscaping works, external environmental interpretation in the immediate vicinity and pop-up café potential

APPENDIX A

VISITOR AND NON VISITOR CONSULTATION

A.1 Full Survey Analysis

A.1.1 Introduction

This section presents the results of all public consultation performed with both previous visitors and non visitors to Provost Skene's House (PSH). The focus of the consultation was understanding the profile of visitors and non-visitors and to explore how they might like to see Provost Skene's House developed. The purpose of the consultation was as follows:

- To provide data that would complement the market assessment and thus inform the visit number projections for the redeveloped attraction
- To directly inform Studioarc's visitor experience proposals
- To provide an insight into audience development opportunities at PSH but also for ACC more generally through comparison with data held for its other heritage attractions

A.1.2 Methodology

On-street survey research was delivered by our market research partner What's Your View Ltd during Saturday 14th and Sunday 15th May. Respondents were recruited at the Aberdeen Maritime Museum (40 respondents), Tolbooth Museum (25 respondents) and on-street around the city centre (160 respondents). A sample of 225 was achieved including 72 previous visitors and 153 non-visitors.

At the commissioning meeting it was agreed that we would expand our study methodology to include an online survey to complement the on-street survey which was stated in our original proposal. It was also later agreed that the survey could be distributed amongst attendees at the Lunchbreak Concert on the 19th May for self-completion. In order to secure the most relevant sample from the on-street surveys it was agreed to include a screening question which permitted only those who had previously visited a cultural/historic attraction in the past 12 months to continue with the survey. In order for all results to be analysed together it was therefore necessary that the online survey followed this design.

A number of unforeseen issues were unfortunately encountered with the online survey including:

- Frustration surrounding the screening question
- Some respondents encountered issues when completing the survey leading to their session being terminated. When respondents realised they could complete the survey for a second time after this had occurred, some individuals queried the survey's reliability due to the ability to submit multiple responses, and indeed some openly admitted to purposely completing numerous responses
- Use of the survey to share opinion on the wider Marischal Square redevelopment as opposed to the redevelopment of Provost Skene's House specifically

By the time frustrations with the screening question were apparent, a sizeable sample had been achieved. It was therefore agreed that the screening question could be removed allowing wider participation. For the purposes of our study online survey results are drawn from online questionnaires completed before the screening question was removed (total sample size of 819). We allowed the survey to continue without the screening question until the end of the working day on Wednesday 18th May. There were only a further 49 completions during this period. Frequency table results for these additional respondents are provided in Appendix C.

In response to point two above we are able to filter out any incomplete surveys thus mitigating the risk of multiple completions as a result of the technical difficulties encountered whilst ensuring such respondents were still able to participate. A total of 227 incomplete surveys have been excluded from our analysis. Whilst we were keen to permit multiple users of the same device to participate (e.g. same household/ those accessing a library computer) the evidence of attempts to manipulate results with the same user completing the survey several times has meant that we have elected to exclude any duplicate completions from the same device. A total of 64 survey records from duplicate IP addresses were filtered from our analysis.

The table below summarises the survey responses received:

TABLE A.1 SURVEY RESPONSES BY TYPE			
	Total Responses	Invalid (incomplete and spoiled)	Valid Surveys
Online (to lunchtime 13 th May)	819	341 (277 incomplete, 64 duplicate IP addresses)	478
On-Street	228	0	228
Total			706
Previous Visitor			482
Non-Visitor			224

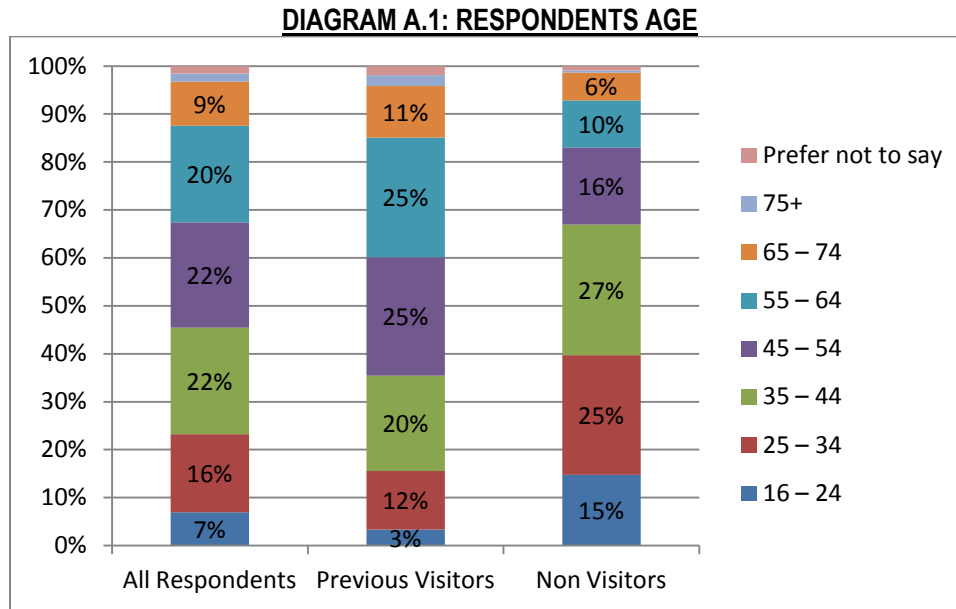
This section presents the survey results drawing from the overall survey sample and/or from results pertaining to visitors and non visitors where most relevant. Full frequency responses are provided in Appendix C.

A.1.3 Profile

Age

Out of the total 706 responses 695 respondents shared their age. As presented below a wide age range is represented with strongest representation amongst the 35-44 year old (22%), 45-54 year old (22%) and 55-64 year old (20%) age brackets. The majority of previous PSH visitors (n=482) were aged between 35 and 64 years (70%). There is relatively low representation amongst those aged 34 years and under, particularly those aged 16-24 years (n=16, 3%). There is greater representation of the younger age categories amongst

non-visitors with 15% aged 16-24 years and 25% aged 25-34 years. From this the young adult category emerges as a particular audience of interest in terms of audience development objectives and has been selected as a segment for further analysis.



Gender Identify

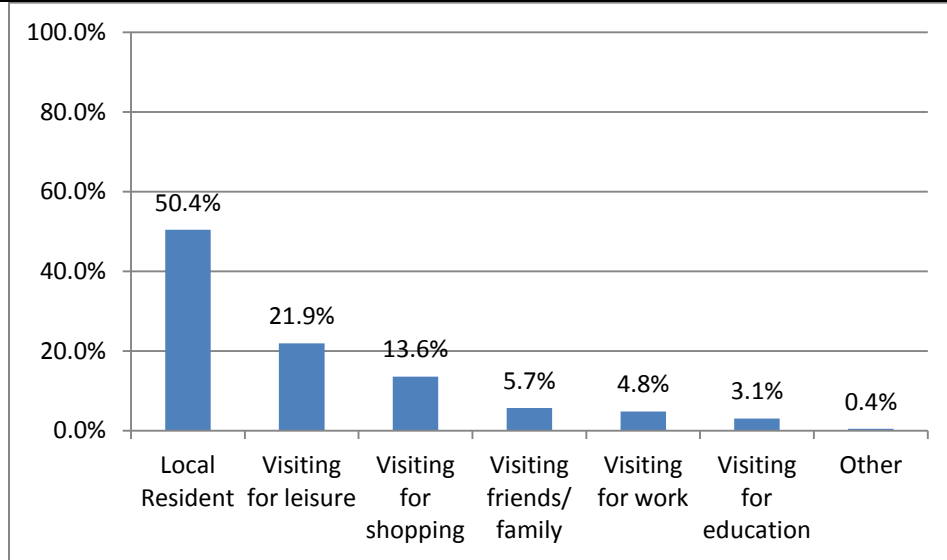
A majority of the 691 respondents who shared their gender identity were female (63% female compared to 35% male, >1% transgender). This is largely consistent across previous visitors (64% female and non-visitors 60% female).

Residence

A total of 636 respondents provided valid residency data. The vast majority of respondents resided in either Aberdeen City (49%) or Aberdeenshire (30%). A low proportion were from elsewhere in Scotland (15%) and even fewer were from elsewhere in the Britain (3%) or from overseas (1%). This demonstrates that our survey sample is largely comprised of respondents from the local market with some representation of the day trip market.

This finding is substantiated by data pertaining to the purpose of on-street survey respondents' visit to Aberdeen that day. As illustrated in the graph below approximately half were local residents (n= 115/228 respondents or 50%). A little over one fifth were visiting for leisure (n=50, 21.9%).

DIAGRAM A.2: PURPOSE OF VISIT TO ABERDEEN (ON-STREET SURVEY RESPONDENTS)

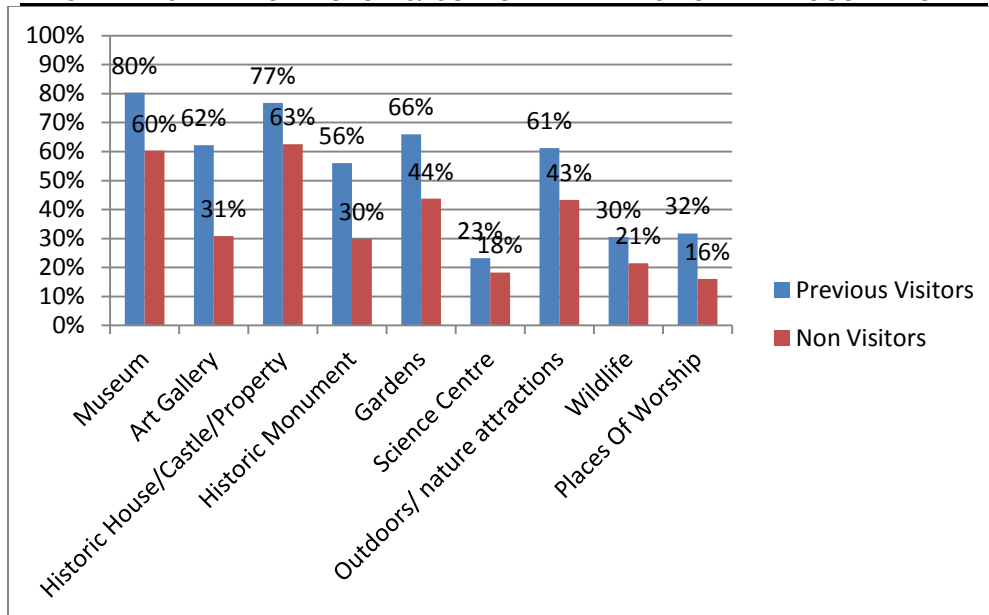


Leisure visitors from the day trip and tourist markets are a target audience for PSH. As such, further analysis pertaining to responses from the leisure segment in particular has been performed in order to explore whether there are particular trends associated with this audience (see Section 3).

A.1.4 Recent Visits to Historic/Cultural Attractions

The graph below presents the types of historic/cultural attractions visited by survey respondents in the past 12 months.

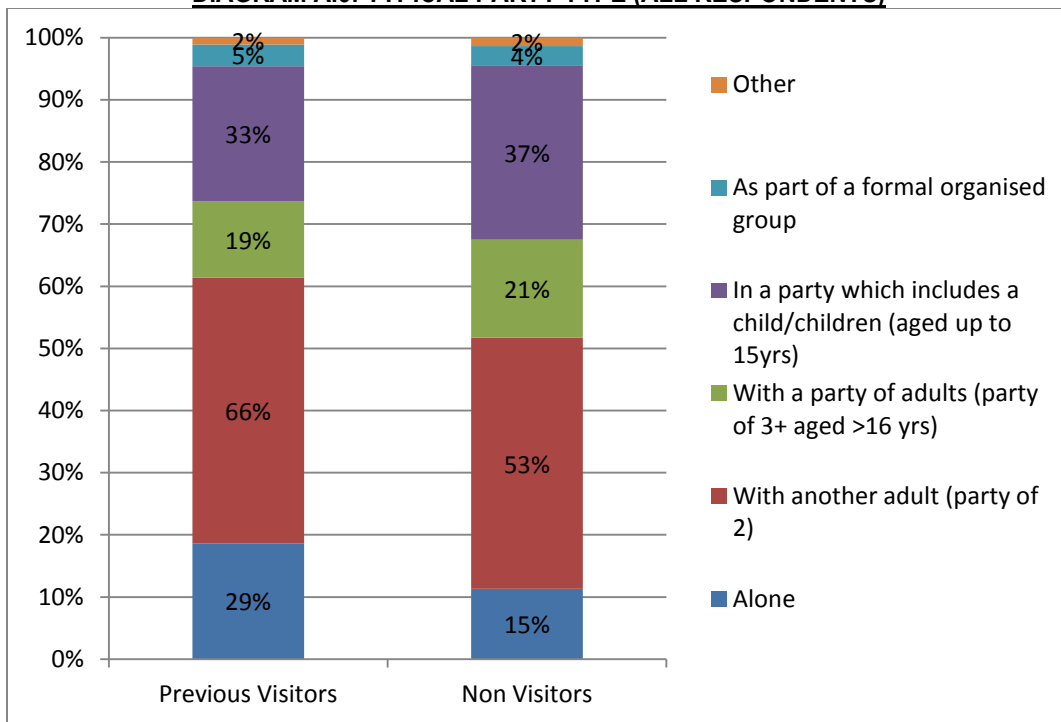
DIAGRAM A.3: TYPE OF HISTORIC/ CULTURAL ATTRACTION PREVIOUSLY VISITED



As an urban city centre historic house, PSH is distinct from many of the castles named above. However, there is a strong similarity in the type of visitor experience typically delivered within the confines of the castle building and historic properties. This bodes well for the redeveloped PSH in drawing these castle enthusiasts and highlights comparators worthy of further consideration.

The trend in terms of visiting party is by and large consistent across previous visitors and non visitors although proportionately fewer of the latter reported as visiting attractions alone. Visiting with another adult was the most typical party type (66% and 53% respectively) followed by in a party which includes a child/children aged up to 15 years (33% and 37% respectively). The family audience is undoubtedly a target audience for the redeveloped PSH.

DIAGRAM A.5: TYPICAL PARTY TYPE (ALL RESPONDENTS)

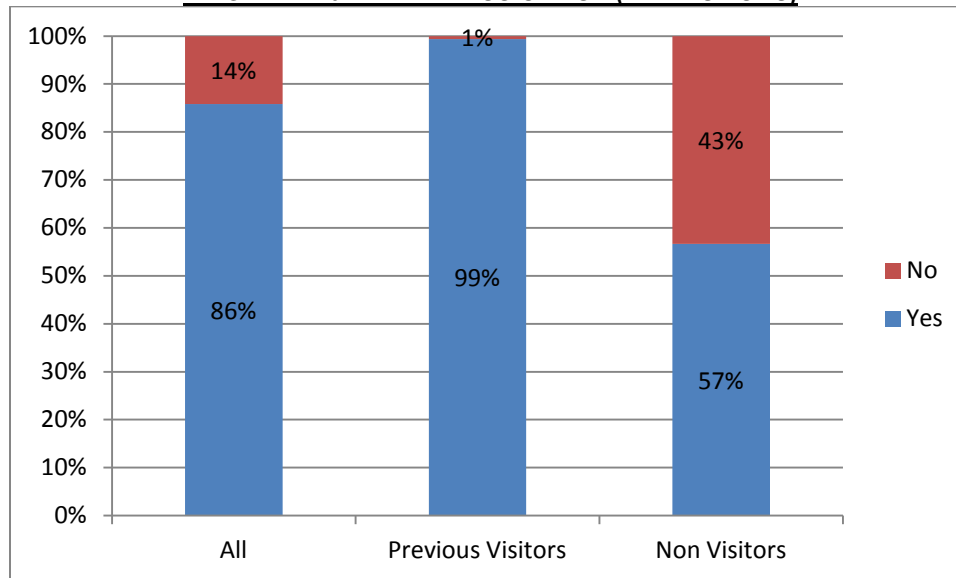


A.1.5 Provost Skene's House

Awareness

As illustrated in the graph below, the vast majority of respondents had heard of PSH (n=606, 86%) demonstrating a high degree of awareness amongst what is mostly a local resident survey sample. Inevitably this result is influenced by the response of previous visitors. Over half of non visitors had previously heard of PSH (n=127, 57%) which is a considerable volume. However, in considering that the sample is largely comprised of respondents from the local area this does highlight a potential issue concerning marketing and communications.

DIAGRAM A.6: AWARENESS OF PSH (ALL VISITORS)

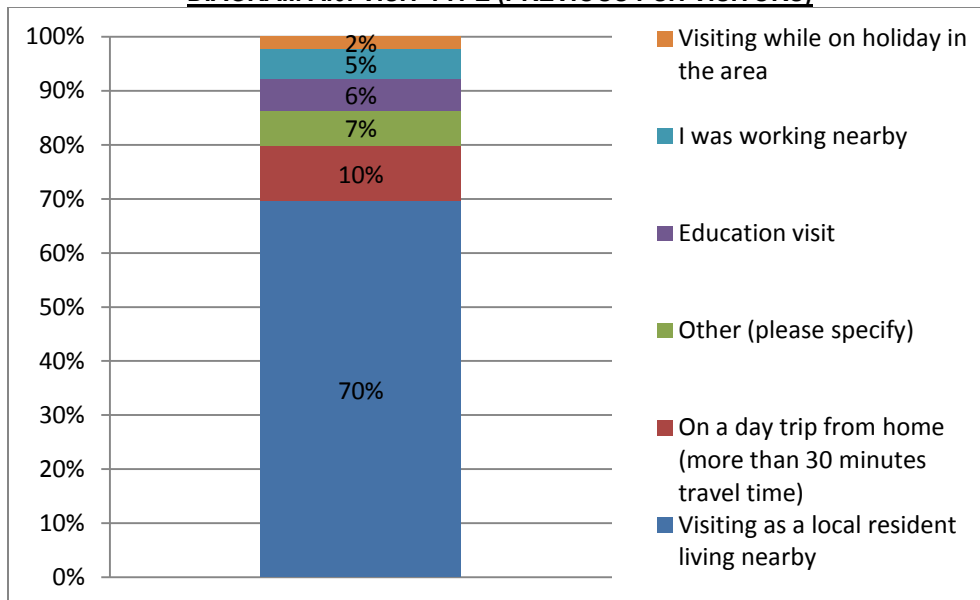


As previously stated, 482 respondents had previously visited which equates to approximately 80% of those who were aware of its existence.

Previous Visitors

Consistent with previous findings, the majority of visits were made by local residents who lived nearby (n=330/476 respondents, 70%). Only 10% of trips were made as part of a day trip from home (n=49) and even less were made during a holiday to the area (n=11, 2%).

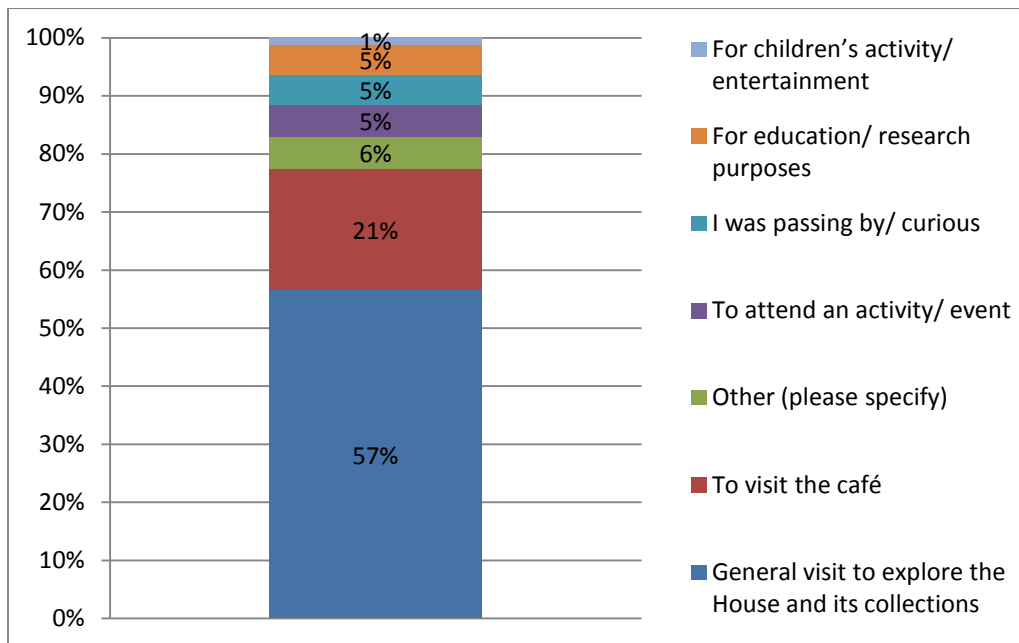
DIAGRAM A.6: VISIT TYPE (PREVIOUS PSH VISITORS)



'Other' responses (n=31) somewhat deviated from the question offering more detail about the reason for their visit. Comments principally included people taking friends from outside Aberdeen (n=5), visiting whilst shopping in the vicinity (n=4), participating in organised activities (n=4), and to visit the café (n=4).

Previous visitors were also asked to identify one main reason for their last visit to PSH. As presented in the graph below, of the 476 previous visitors who responded, a general visit to explore the house and its collections was the most common (n=269, 57%). This was followed by café motivated visits (n=99, 21%). Few visitors done so for the purpose of attending an activity/ event (n=26, 5%), because they were passing by/curious (n=25, 5%), for education/research (n=24, 5%) or for children's activity/entertainment (n=6, 1%). The latter in particular is a potential development area with potential for the renewed visitor experience to provide a more distinct draw amongst children.

DIAGRAM A.7: VISIT REASON (PREVIOUS PSH VISITORS)



'Other' comments (n=27) are largely consistent with those detailed above with the addition of visits motivated by a desire to explore the building before the Marischal Square redevelopment is complete (n=4). This alludes to the negative opinion held by some respondents to the wider Marischal Square redevelopment rather than PSH specifically. Such opinion is expressed in greater volume later in the survey, see section A.1.7 below.

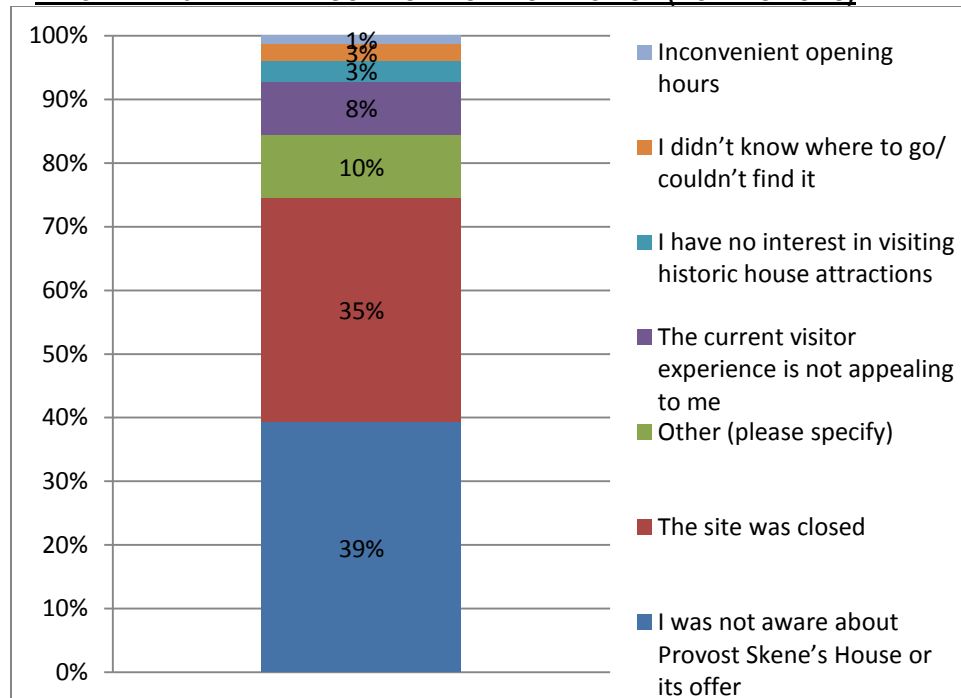
Barriers

Non visitors were asked to state one main reason for not having previously visited PSH. As presented in the graph below, lack of awareness (n=88, 39%), followed by the site being closed (n=79, 35%) were the most

common reasons. Encouragingly, only 3% of respondents indicated that they have no interest in visiting historic house attractions (n=7).

Other responses (n=23) principally concerned a lack of awareness, specifically lack of knowledge that it was open as a visitor attraction (7 comments), lack of knowledge about its offer (2 comments) and lack of awareness the building existed until the surrounding council buildings were demolished (4 comments). Others stated that they meant to visit but have not yet found the time to do so (4 comments).

DIAGRAM A.8: MAIN REASON FOR NOT VISITING PSH (NON VISITORS)

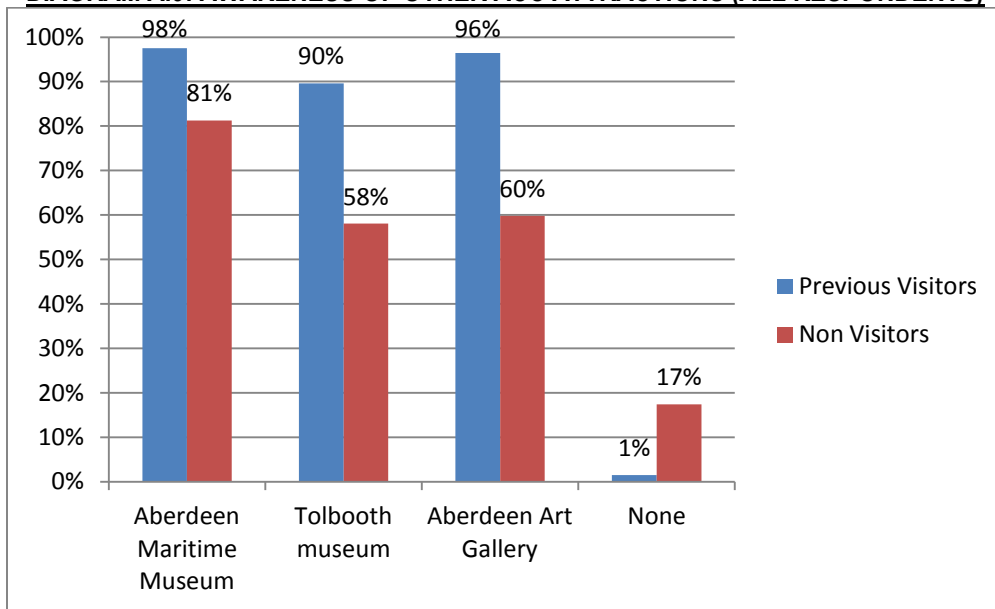


These findings are positive from the perspective that the redevelopment of Marischal Square together with the redevelopment of PSH will inevitably raise the profile and therefore awareness of PSH within Aberdeen and beyond. A much improved PSH visitor experience has potential to provide the stimulus for current non visitors to make the decision to visit once they understand what it has to offer them.

A.1.6 Other ACC Attractions

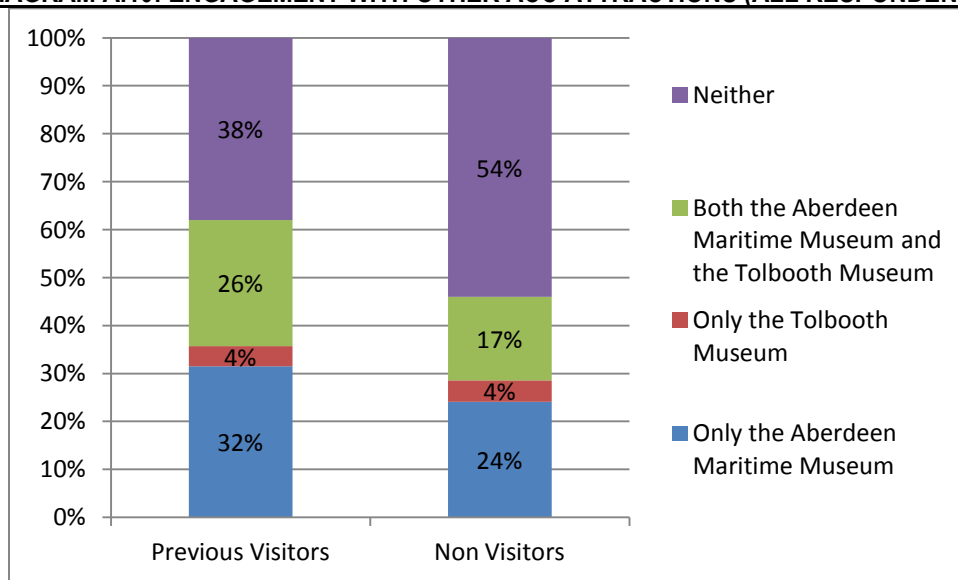
ACC is keen to present PSH as one in a portfolio of ACC attractions available for visitors to enjoy. Questions were therefore asked surrounding awareness of and engagement with other attractions run by ACC. The graphs below present the results grouped by visitor and non visitor response. Note that Aberdeen Art Gallery is currently closed for redevelopment and is therefore unavailable to visit.

DIAGRAM A.9: AWARENESS OF OTHER ACC ATTRACTIONS (ALL RESPONDENTS)



Almost all previous PSH visitors were aware of all three of ACC's other attractions. Awareness amongst non PSH visitors was more variable. Awareness of the Aberdeen Maritime Museum was highest (n=182, 81%). Whilst still a majority, awareness of the Tolbooth Museum and Aberdeen Art Gallery was lower (n=130, 58% and n=134, 60% respectively).

DIAGRAM A.10: ENGAGEMENT WITH OTHER ACC ATTRACTIONS (ALL RESPONDENTS)



Whilst the previous graph demonstrates a high level of awareness of other ACC attractions, the graph above highlights a considerable lack of engagement in the past 12 months, more so amongst non PSH visitors (n=121, 54%) than previous visitors (n=183, 38%). Focusing on non PSH visitors in particular, there

was however also a considerable proportion who had visited another ACC attraction in the past 12 months (n=103, 45%). Amongst both previous PSH visitors and non visitors, the Aberdeen Maritime Museum was the most visited (32% of previous PSH visitors having visited in the past 12 months and 24% of non PSH visitors having visited in the past 12 months).

This indicates potential for better cross-promotion and audience sharing between the three ACC venues. For PSH specifically, the Aberdeen Maritime Museum in particular presents an opportunity to engage with current non visitors within immediate reach. Audiences which have not visited PSH but have visited either the Tolbooth Museum or Aberdeen Maritime Museum in the past 12 months are therefore an audience of particular interest which have been included in more detailed segmentation analysis.

A.1.7 Redevelopment Proposals

Interpretive Themes

In order to inform the proposals being developed by Studioarc, a number of interpretive themes were presented to respondents for consideration. Respondents were asked to rate their view on a range of themes identified by Studioarc as potential channels through which the heritage of PSH can be explored placing it in its local, regional and national context.. These themes encompass five overarching subject areas categorised as follows:

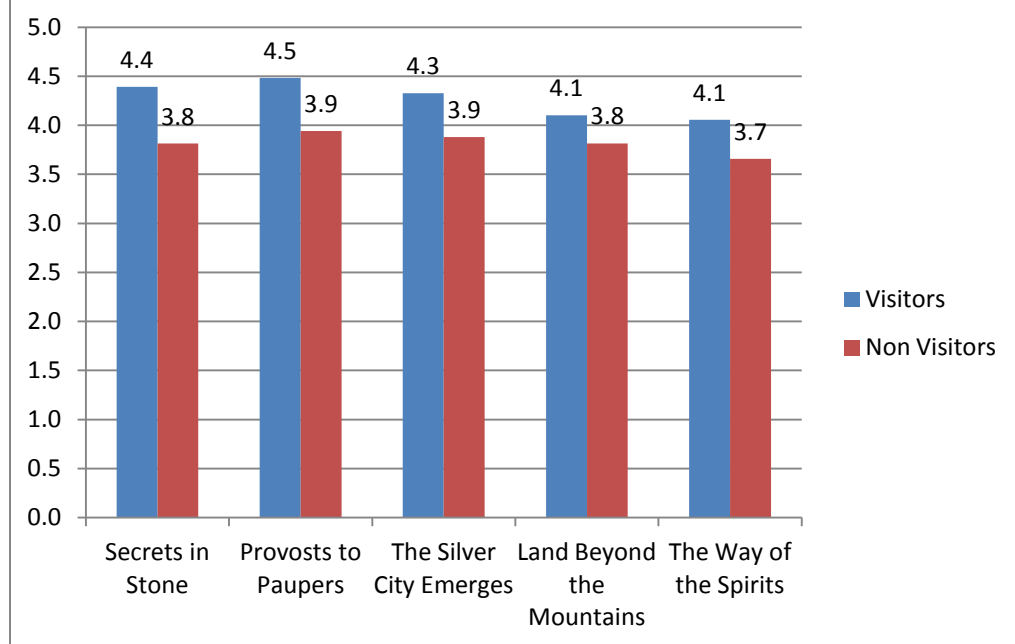
Architectural Change	'Secret's in Stone' – exploring the building, its architectural features and how it has evolved over time
Social Change	'Provosts to Paupers' – the story of the House, its inhabitants and their extraordinary lives
Urban Change	'The Silver City Emerges' – exploring historic Aberdeen, its growth and regeneration
Geographic Change	'Land Beyond the Mountains' – from early settlers to international trade and continental culture
	'The Way of the Spirits' – the myths and legends associated with the House

Respondents were asked to rate their view on each theme on a scale of 1 (very uninterested) to 5 (very interested). The graph below presents the mean score grouped by previous visitors and non visitors employing the following categorisation:

- High support: mean score 4+
- Moderate support: mean score 3 - 3.9
- Low support mean score 1 - 2.9

Note that the below excludes respondents who answered 'don't know.' Such responses are reflected in Diagrams A.12 and A.13 below.

DIAGRAM A.11: PROPOSED PSH THEMES MEAN OPINION SCORE (ALL RESPONDENTS)



A high level of support is evident amongst previous visitors for all suggested themes (means score range of 4.1 to 4.5). With a mean score of 4.5, 'Provosts to Paupers' emerges as the most popular theme.

Interest levels amongst non PSH visitors, although classed as moderate, with a mean score range of 3.7 to 3.8 are not far behind the visitors' scores. This suggests that all of the proposed themes have potential to capture the interest of all audiences. This is extremely positive in terms of the audience development potential of the redevelopment where deepening current engagement whilst simultaneously widening engagement amongst new audiences is key.

The graphs below provide further insight illustrating the breakdown in relation to specific responses, again grouped by visitor and non-visitor responses. 'Don't know' responses are now included. All 482 previous visitors and all 224 non visitors responded. Amongst both previous visitors and non visitors there were a minimal number of 'don't know' responses from which it can be deduced that there were minimal issues grasping the thrust of the theme from the description.

DIAGRAM A.12: PROPOSED PSH THEMES OPINION RATING BREAKDOWN (PREVIOUS VISITORS)

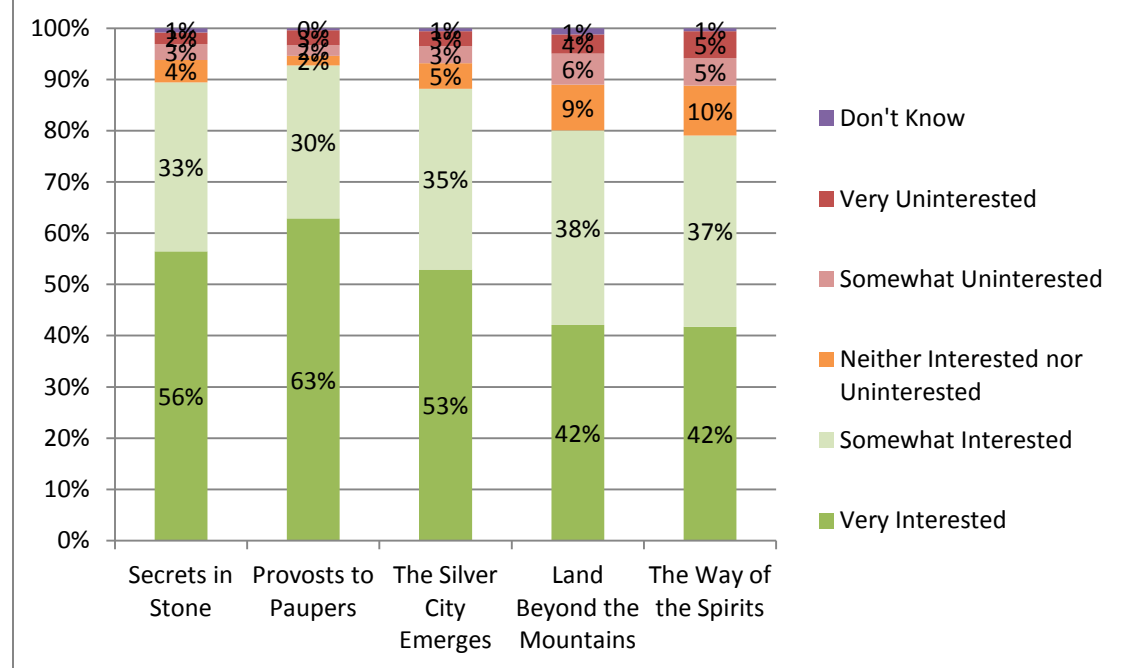
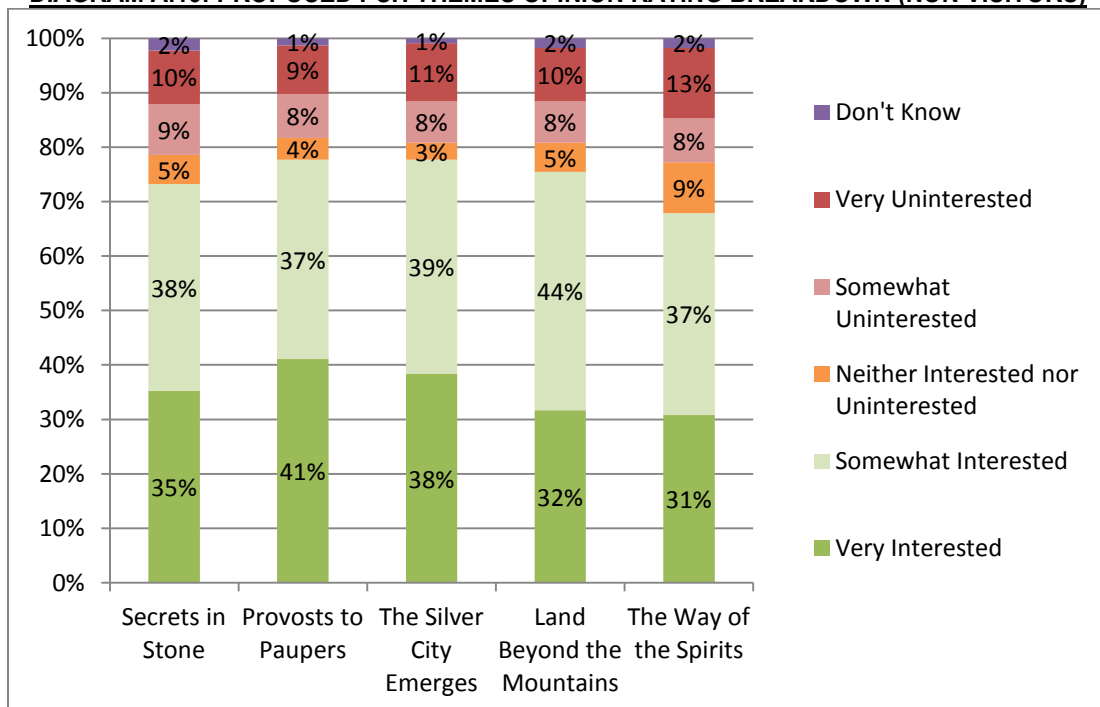


DIAGRAM A.13: PROPOSED PSH THEMES OPINION RATING BREAKDOWN (NON VISITORS)



With a range of 79% to 93% ('somewhat interested' and 'very interested' combined) a sizeable majority of all previous visitors expressed interest in all presented themes. Three themes generated particularly high levels of interest (>85%) which included 'Provosts to Paupers' (93%), 'Secrets in Stone' (89%) and 'The Silver City

Emerges' (88%). Whilst a majority of respondents were 'very interested' in each of the aforementioned themes, 'Provosts to Paupers' received the greatest such rating (63%). This explains its emergence as the most popular theme illustrated in graph A.11 above.

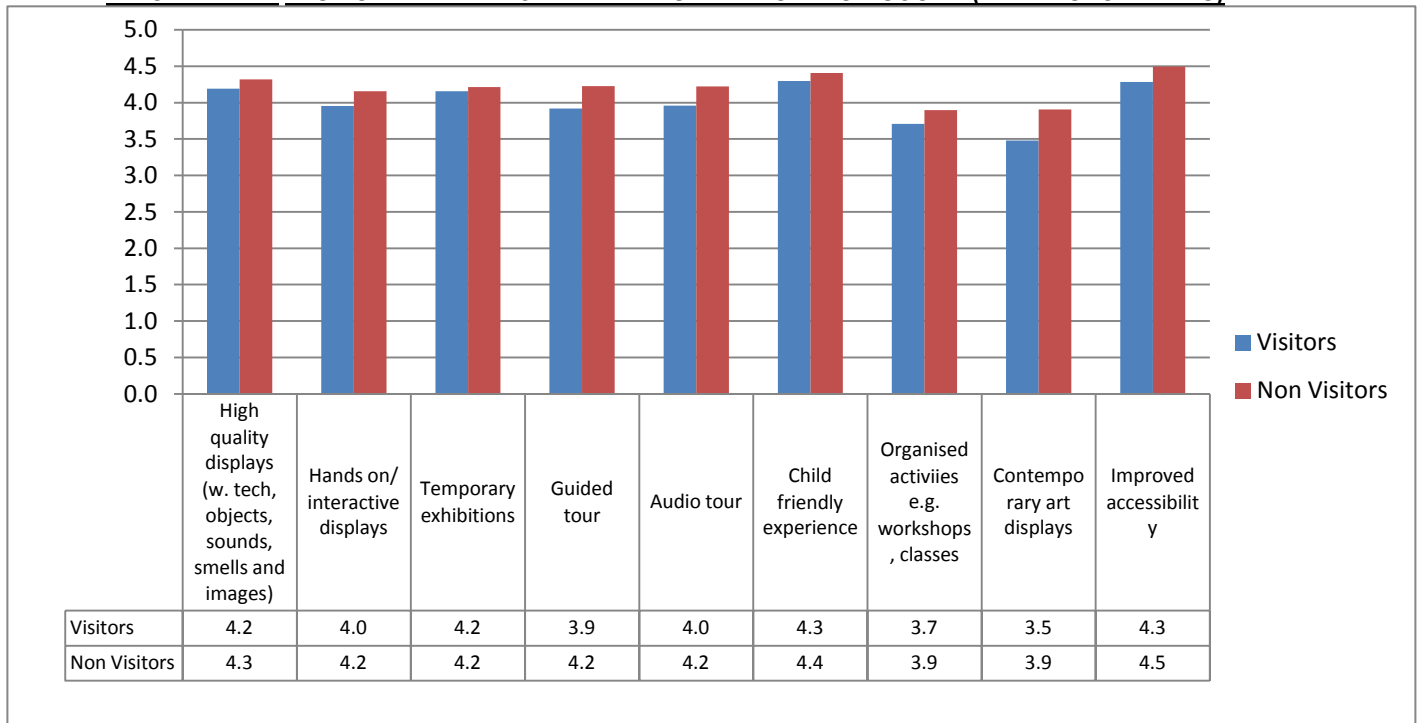
A sizeable majority of non visitors also considered the suggested themes to be interesting, however with a range of 68% to 78% ('somewhat interested' and 'very interested' combined) this was to a lesser extent than amongst previous PSH visitors. Here 'Provosts to Paupers' emerged as joint top theme alongside 'The Silver City Emerges', however these were closely followed by 'Land Beyond the Mountains' and then 'Secrets in Stone.'

From this it is apparent that all of the suggested themes appeal to both previous visitors and non visitors. 'Provosts to Paupers' is the most appealing theme which is of significance for decisions regarding the scale of exhibition space dedicated to themes and their position in the visitor journey.

Methods of Engagement

In order to inform decisions surrounding the visitor experience, respondents were asked to consider how important they felt it was that the redevelopment included various different visitor experience elements. Visitors were asked to rate each element from 1 (very unimportant) to 5 (very important) or to select 'don't know.' The graph below presents the mean score grouped by previous visitors and non visitors. 'Don't know' responses are again excluded at this stage of the analysis. Note that a café facility was excluded from the list on the grounds that ACC have already taken the decision that this will not feature.

DIAGRAM A.14: VISITOR EXPERIENCE ELEMENTS MEAN OPINION SCORE (ALL RESPONDENTS)

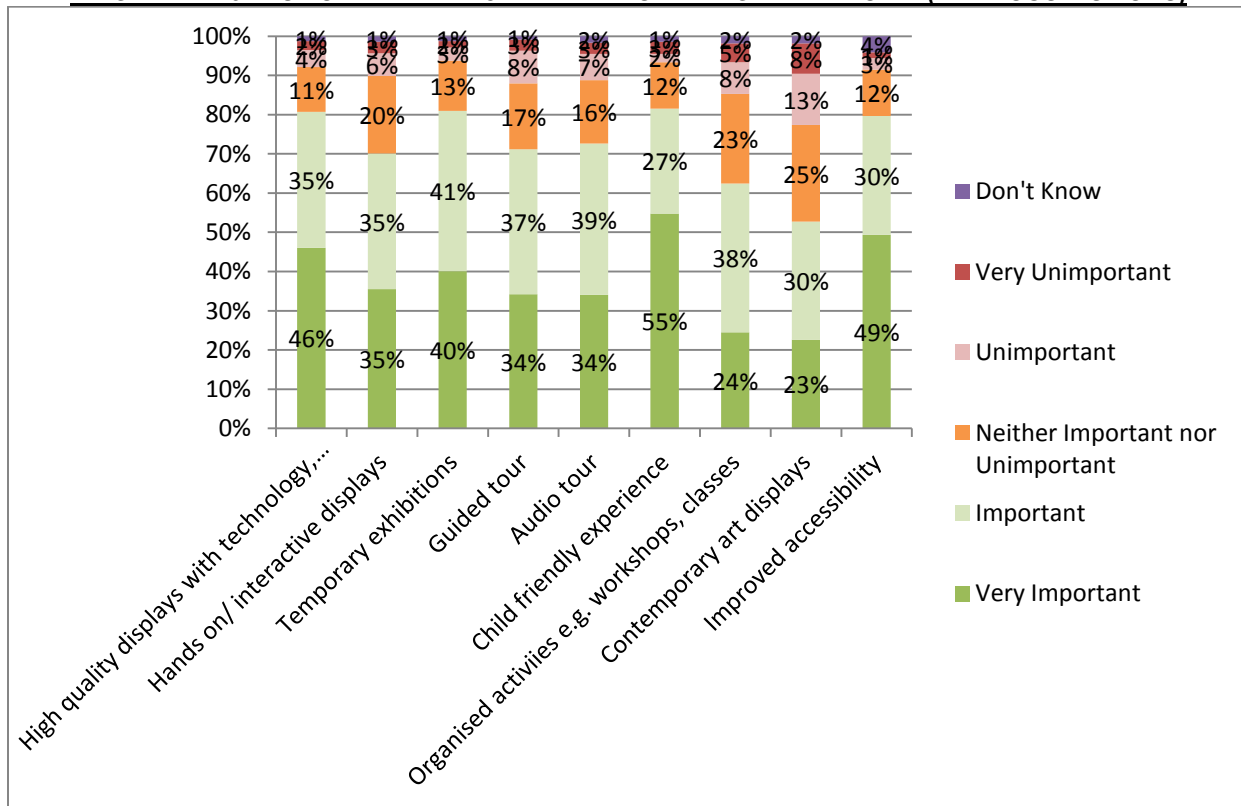


Amongst visitors, the majority of suggested visitor experience elements are considered of high importance. Only organised activities and contemporary art displays achieved a mean score categorising them of moderate importance. No elements were considered of low importance. Elements which attained the highest mean scores were improved accessibility and child friendly experience (mean score 4.3 respectively), followed by high quality displays and temporary exhibitions (4.2 respectively).

There is a consistency with the responses of non visitors in the high and moderate scores attributed to each visitor experience element. Interestingly however, the majority of the listed visitor experience elements were considered to be of slightly greater importance for a redeveloped PSH amongst non visitors than visitors. For example the top two elements, improved accessibility and child friendly experience secured mean scores of 4.5 and 4.4 respectively. High quality displays was considered the third most important overall with a mean score of 4.3.

The graphs below break down the results by specific response, including 'don't know.' On the whole the proportion of 'don't know' responses is low. The only element for which this response was greater than 5% of the total sample size was regarding improved accessibility amongst non-visitors (n=26/224, 12%).

DIAGRAM A.15: VISITOR EXPERIENCE ELEMENTS RATING BREAKDOWN (PREVIOUS VISITORS)

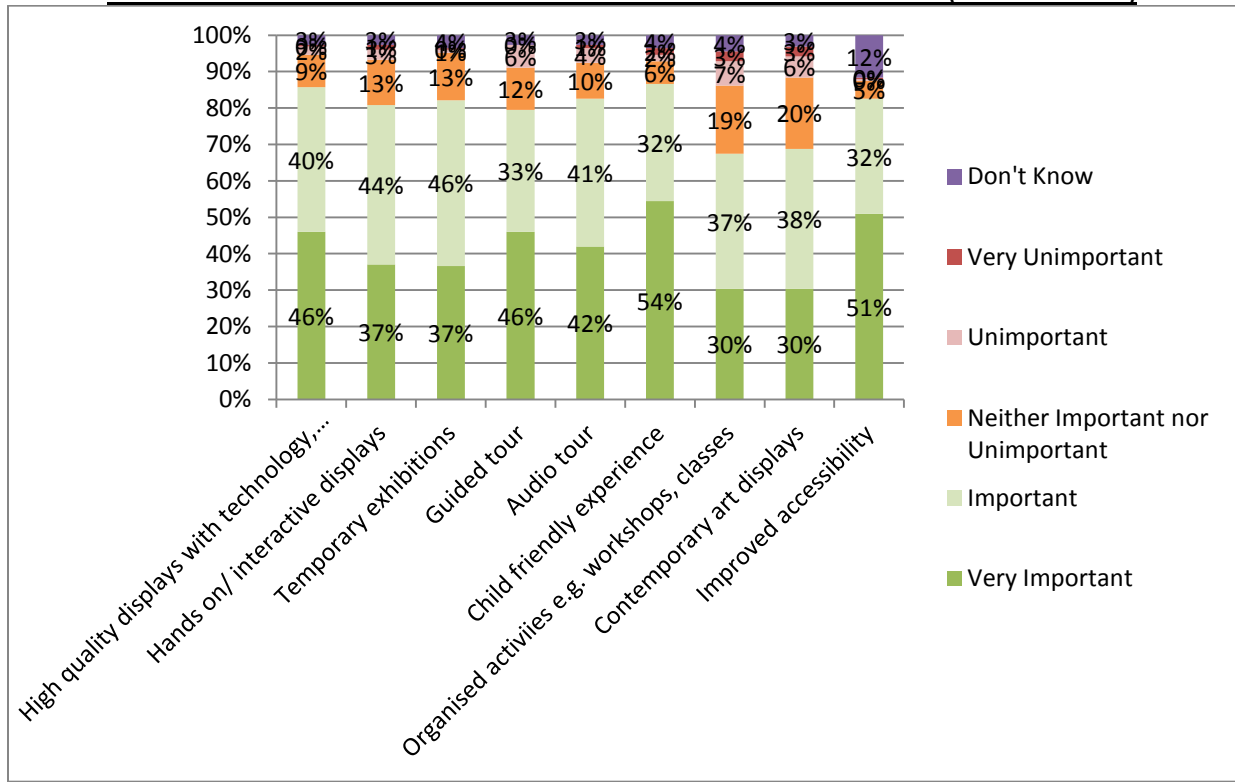


The above graph reveals that whilst improved accessibility emerges as the most important element based on the mean score, a child friendly experience attains the greatest 'very important' score amongst previous visitors (55%). This is followed by improved accessibility (49%) and high quality displays with technology, objects, sounds, smells and images (46%).

The graph also demonstrates a proportionately greater neutral response rate than negative response (unimportant and very unimportant combined). From this it is apparent that there is very little negative opinion towards any of the suggested visitor experience elements. The greatest negative view (very unimportant and unimportant combined) was expressed towards contemporary art displays (21%).

Similar results are again apparent in the breakdown of non visitor responses, presented in the graph below.

DIAGRAM A.16: VISITOR EXPERIENCE ELEMENTS RATING BREAKDOWN (NON VISITORS)



Child friendly experience secures the highest 'very important' rating (54%) followed by improved accessibility (51%) and high quality displays with technology, objects, sounds, smells and images (46%). In contrast with previous visitor responses, guided tours and audio tours are viewed of greater importance with 46% of respondents considering them very important

Guided tours and audio tours secured higher very important ratings amongst non visitors than visitors (46% compared to 34% and 42% compared to 34% respectively), highlighting these as a particular visitor experience element with potential to appeal specifically to new audiences. Contemporary art displays were

also viewed as more appealing amongst non visitors. 69% of non visitors considered such displays to be either important or very important (compared to 53% of previous visitors) and only 8% viewed them to be either unimportant or very unimportant (compared to 21% of previous visitors).

Overall this data demonstrates the overall appeal of all of the proposed aspects of the redeveloped PSH visitor experience. With a common appeal across both visitors and non visitors, certain aspects emerge as priority areas, namely improved accessibility, child friendly experience and high quality displays. There are also specific elements with a particular appeal amongst non visitors which indicates key aspects of the visitor experience which could increase the appeal of visiting PSH amongst new visitors, guided and audio tours in particular.

Other Comment

Respondents were then asked as an open-ended question whether they had any other suggestions for improving the visitor experience at PSH. Responses have been grouped by those from previous visitors and non-visitors.

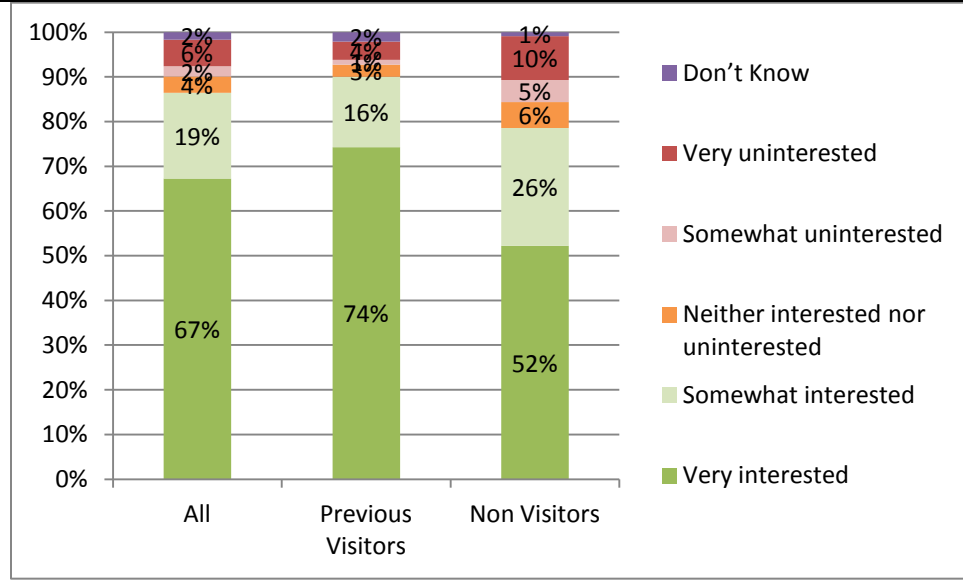
A total of 332 previous visitors provided a total of 395 valid responses to the question. A significant proportion however did use this as an opportunity to express a view on the wider Marischal Square redevelopment as opposed to PSH specifically. A total of 145 such views were expressed, all were negative. To summarise the general feeling, there is a strong concern that the development will impose upon and conceal PSH. There is a preference for a civic space rather than commercial development.

The word cloud below illustrates the response to this open ended question Given that they do not relate to the question asked; comments on the Marischal Square development have been excluded from this analysis. They are however presented alongside all comments as expressed in the survey in Appendix C. Total number of relevant comments was therefore 250. Note that size of font relates to frequency of citation.

DIAGRAM A.17: OTHER SUGGESTIONS FOR IMPROVING THE VISITOR EXPERIENCE (PREVIOUS VISITORS)



DIAGRAM A.19: INTEREST IN VISITING PSH POST REDEVELOPMENT (ALL RESPONDENTS)



The vast majority of all 706 respondents (86%) expressed an interest in visiting (somewhat interested and very interested combined). Encouragingly, a considerable majority (67%) were very interested. Only 8% were either somewhat or very uninterested in visiting.

Interest was higher amongst previous visitors (90%, n=434, interested/very interested) however a considerable majority of non visitors were also keen to visit (78%, n=176). Only 15% of non visitors indicated that they would not be interested in visiting after the redevelopment which, once again, bodes well for the audience development potential of the redeveloped PSH.

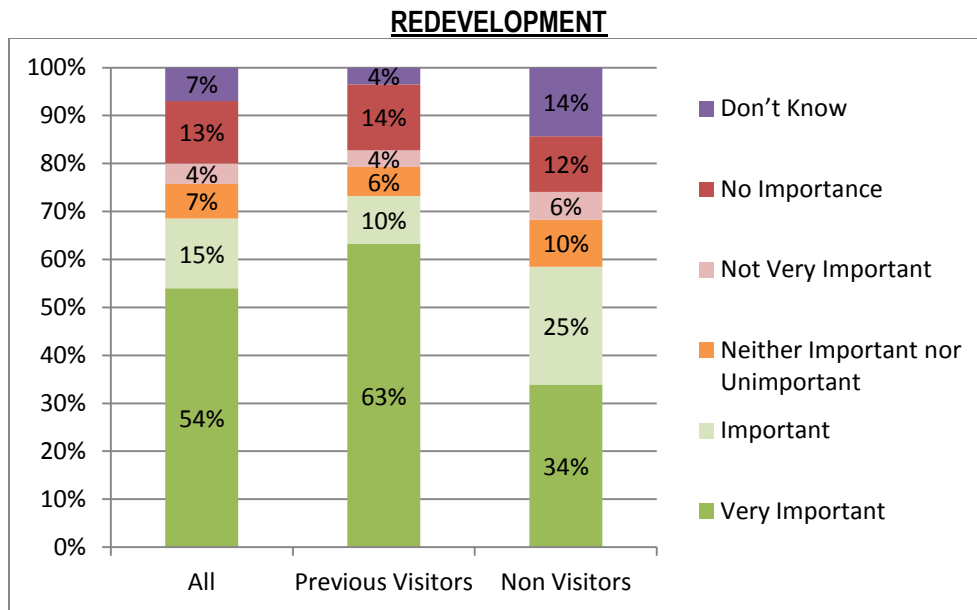
A.1.8 Importance of the PSH Redevelopment

The redeveloped PSH will sit within a wider redevelopment project encompassing Marischal Square. Respondents were asked to consider how important they felt the redevelopment of PSH was to this wider development.

As illustrated in the graph below a majority of all respondents considered the redevelopment to be either 'very important' or 'important' (69%), a considerable proportion of which felt it was 'very important' (54%). The breakdown between visitors and non visitors does demonstrate that this feeling is strongest amongst previous visitors (73% stating 'important' or 'very important'), however a majority of non visitors still take this view (59%). Only 18% of visitors and non visitors respectively felt that it was not important.

This highlights the significance of PSH as an asset and Aberdeen landmark, regardless of whether people have previously engaged with it or not and therefore its continued importance within the Marischal Square redevelopment.

DIAGRAM A.20: IMPORTANCE OF THE REDEVELOPMENT OF PSH WITHIN WIDER MARISCHAL SQUARE



3. Who do you typically visit historic or cultural attractions with? (please select all that apply)

	Alone	<go to Q4>
	With another adult (party of 2)	
	With a party of adults (party of 3+ aged over 16 yrs)	
	In a party which includes a child/ children (aged up to 15 yrs)	
	As part of a formal organised group	
	Other (please state)	

4. Have you ever heard of Provost Skene's House? (please select one)

	Yes	<go to Q5>
	No	<go to Q6>

5. Have you previously visited Provost Skene's House? (please select one)

	Yes	< go to Q7>
	No	<go to Q6>

6. If you have never visited Provost Skene's House, why not? (please select one main reason)

	I was not aware about Provost Skene's House or its offer	<go to Q9>
	The site was closed	
	Inconvenient opening hours	
	The building itself is inaccessible to me	
	Transport challenges in getting to Provost Skene's House	
	I didn't know where to go/ couldn't find it	
	The current visitor experience is not appealing to me	
	The site was closed	
	I have no interest in visiting historic house attractions	
	Other (please state):	

7. Thinking about the last time you visited Provost Skene's House, what type of visit was this? (please select one)

<input type="checkbox"/>	Visiting as a local resident living nearby	<go to Q8>
<input type="checkbox"/>	On a day trip from home (more than 30 minutes travel time)	
<input type="checkbox"/>	Visiting while on holiday in the area	
<input type="checkbox"/>	Education visit	
<input type="checkbox"/>	I was working nearby	
<input type="checkbox"/>	Other (please specify)	

8. Thinking about the last time you visited Provost Skene's House, what was your main reason for visiting? (please select one)

<input type="checkbox"/>	General visit to explore the House and its collections	<go to Q9>
<input type="checkbox"/>	To attend an activity/ event	
<input type="checkbox"/>	For children's activity/ entertainment	
<input type="checkbox"/>	For education/ research purposes	
<input type="checkbox"/>	I was passing by/ curious	
<input type="checkbox"/>	To visit the café	
<input type="checkbox"/>	Other (please state)	

9. Provost Skene's House is run by Aberdeen City Council. Are you aware of the other Aberdeen City Council museums/ galleries? (please tick all of those you are aware of)

<input type="checkbox"/>	Aberdeen Maritime Museum	<go to Q10>
<input type="checkbox"/>	Tolbooth Museum	
<input type="checkbox"/>	Aberdeen Art Gallery	
<input type="checkbox"/>	None	

10. Have you visited either the Aberdeen Maritime Museum or the Tolbooth Museum in the past 12 months?
 – * Aberdeen Art Gallery is currently closed for redevelopment (please select one answer)

<input type="checkbox"/>	Only the Aberdeen Maritime Museum	<go to Q11>
<input type="checkbox"/>	Only the Tolbooth Museum	
<input type="checkbox"/>	Both the Aberdeen Maritime Museum and the Tolbooth Museum	
<input type="checkbox"/>	Neither	

REDEVELOPMENT PROPOSALS

READ ALOUD:

Provost Skene’s House sits at the heart of the medieval town of Aberdeen and also at the heart of the Marischal Square development. For five centuries it has witnessed enormous change, both in its own structure and in its surroundings; its story is one of riches, rags and regeneration. The aspiration is to redisplay and enhance the interpretation of Provost Skene’s House creating an improved visitor experience which emphasises the building’s history, its place in Aberdeen and the stories of the people who lived there.

<show image 2>

11. There are a wide variety of themes and topics which can be explored at Provost Skene’s House. How interested are you in learning about the following topics? (please select one response for each)

	1. Very interested	2. Somewhat interested	3. Neither interested nor uninterested	4. Somewhat uninterested	5. Very uninterested	Don’t Know
‘Secrets in Stone’ - exploring the building, its architectural features and how it has evolved over time						
‘Provosts to paupers’ – the story of the House, its inhabitants and their extraordinary lives						
‘The Silver City Emerges’ – exploring historic Aberdeen, its growth and regeneration						
‘Land Beyond the Mountains’ – from early settlers to international trade and continental culture						
‘The Way of the Spirits’ – the myths and legends associated with the House						
< go to Q12>						

12. In your opinion, how important is it that the redevelopment includes the following visitor experience elements: (please select one response for each)

	1. Very important	2. Important	3. Neither important nor unimportant	4. Unimportant	5. Very unimportant	Don't Know
High quality displays combining technology, objects, sound, smells and images						
Hands on/ interactive displays						
Temporary exhibitions						
Guided tour						
Audio tour						
Child friendly experience						
Organised activities such as workshops, classes						
Contemporary art displays						
Improved accessibility						
<i><go to Q13></i>						

13. Do you have any other suggestions for improving the visitor experience at Provost Skene's House?
(please briefly explain below)

<i><go to Q14></i>

14. How interested would you be in visiting the redeveloped Provost Skene's House? *Note that it is intended there will be no admission charge (please select one response)

1. Very interested	2. Somewhat interested	3. Neither interested nor uninterested	4. Somewhat uninterested	5. Very uninterested	Don't Know
<i><go to Q15></i>					

15. How important do you think the redevelopment of Provost Skene's House is to the wider Marischal Square redevelopment? (please tick one)

1. Very Important	2. Important	3. Neither Important nor Unimportant	4. Not Very Important	5. No Importance	Don't Know
< go to Q16 >					

About You

16. What is the purpose of your being in Aberdeen today? (please select one)

	I am a local resident	<go to profile box>
	Visiting for work	
	Visiting for leisure	
	Visiting for shopping	
	Visiting for education	
	Visiting friends/ family	
	Other (please state)	

The following questions are optional. We are interested in your profiling information so that we can understand the issues or improvements which may serve to attract particular audiences.

17. What is your age?			18. How do you identify?		19. Where do you reside?
	16 – 24		55 – 64		Postcode:
	25 – 34		65 – 74		City/ area if postcode unknown:
	35 – 44		75+		
	45 – 54		Prefer not to say		
				Male	
				Female	
				Transgender	
				Prefer not to say	

THANK YOU VERY MUCH FOR TAKING THE TIME TO COMPLETE OUR SURVEY

IMAGE 1: PROVOST SKENE'S HOUSE EXTERIOR



IMAGE 2: PROVOST SKENE'S HOUSE AS PART OF THE REDEVELOPED MARISCHAL SQUARE



APPENDIX B
MARKET APPRAISAL

B.0 MARKET APPRAISAL

This appendix presents the data tables from which the analysis in Section 4 is drawn.

B.1 Local Market

TABLE B.1 LOCAL MARKET POPULATION (30 MINUTE DRIVE TIME)	
	Mid Year Estimates 2013
Aberdeen City	227,130
Aberdeenshire	
Banchory and Mid Deeside (part)	5,208
East Garioch	12,425
Ellon and District	13,708
Inverurie and District	12,143
Mid Formartine (part)	11,496
North Kincardine	14,799
Stonehaven and Lower Deeside	14,661
West Garioch (part)	6,584
Westhill and District	16,165
	107,188
Total	334,318

Source: statistics.gov.scot

B.2 Day Trip Market

TABLE B.2 DAY TRIP MARKET POPULATION (31-60 MINUTE DRIVE TIME)	
	Mid Year Population Estimates 2013
Aberdeenshire	
Aboyn, Upper Deeside and Donside (0.25)	2,902
Banchory and Mid Deeside (0.5)	5,208
Central Buchan	14,209
Fraserburgh and District	15,101
Huntly, Strathbogie and Howe of Alford (0.5)	8,214
Mearns	14,611
Mid Formartine (0.33)	5,922
Peterhead North and Rattray	15,418
Peterhead South and Cruden	11,633
Turriff and District	12,043
West Garioch (0.5)	6,584

TABLE B.2 DAY TRIP MARKET POPULATION (31-60 MINUTE DRIVE TIME)	
	Mid Year Population Estimates 2013
	111,845
Moray	
Montrose and District	16,080
Forfar and District	15,843
Brechin and Edzell	12,125
	44,048
Total	155,893

Source: statistics.gov.scot

B.3 Tourist Market

B.3.1 Volume

TABLE B.3 ABERDEEN & GRAMPIAN TOURIST TRIPS 2014					
Origin	Aberdeen & Grampian		Scotland		A&G as % of Scotland
	No. of Trips	%	No. of Trips	%	
GB	1,228,000	79%	12,520,000	82%	9.8%
Overseas	323,000	21%	2,700,000	18%	12.0%
Total	1,551,000		15,220,000		10.2%

Source: VisitScotland, Tourism in Scotland's Regions 2014

B.3.2 Profile, Motivation and Behaviour

TABLE B.4 ABERDEEN & GRAMPIAN TOURIST TRIPS				
Origin	Aberdeen & Grampian		Scotland	
	Trips	%	Trips	%
GB	1,228,000		12,520,000	
Scotland	787,000	64%	6,516,000	52%
England	428,000	35%	5,569,000	44%
Wales	13,000	1%	435,000	3%
Overseas	323,000		2,700,000	
Norway	52,000	16%	125,000	5%
Germany	43,000	13%	343,000	13%
USA	29,000	9%	418,000	15%
France	27,000	8%	190,000	7%
Total	1,551,000		15,220,000	

Source: VisitScotland, Tourism in Scotland's Regions 2014

TABLE B.5 ABERDEEN & GRAMPIAN TOURIST SPEND				
Origin	Aberdeen & Grampian		Scotland	
	Spend (£)	%	Spend (£)	%
GB	251,000		2,871,000	
Scotland	134,000	53%	1,170,000	41%
England	115,000	46%	1,608,000	56%
Wales	2,000	1%	93,000	3%
Overseas	172,000		1,840,000	
Norway	28,000	16%	68,000	4%
Germany	11,000	6%	174,000	9%
USA	36,000	21%	436,000	24%
France	12,000	7%	110,000	6%
Total	423,000		4,711,000	

Source: VisitScotland, Tourism in Scotland's Regions 2014

TABLE B.6 TOURIST TRIP PURPOSE 2014				
	Aberdeen & Grampian		Scotland	
	Trips	%	Trips	%
GB				
Holiday	676,000	55%	8,867,000	71%
VFR	130,000	11%	1,471,000	12%
Business	399,000	32%	1,921,000	15%
Study	-	0%	-	0%
Other	23,000	2%	260,000	2%
	1,228,000		12,519,000	
Overseas				
Holiday	130,000	40%	1,400,000	52%
VFR	67,000	21%	713,000	26%
Business	117,000	36%	475,000	18%
Study	3,000	1%	45,000	2%
Other	7,000	2%	71,000	3%
	324,000		2,704,000	
Combined				
Holiday	806,000	52%	10,267,000	67%
VFR	197,000	13%	2,184,000	14%
Business	516,000	33%	2,396,000	16%
Study	3,000	0%	45,000	0%
Other	30,000	2%	331,000	2%
	1,552,000		15,223,000	

Source: VisitScotland, Tourism in Scotland's Regions 2014

TABLE B.7 VISIT TYPE ABERDEEN & GRAMPIAN	
Visit Type	%
Touring Around the Country	33%
A visit based in a countryside location	22%
Stayed with friends or family	17%
Stayed in a city and visited countryside	12%
Stayed in a city and visited city attractions	9%
<i>Source: Visit Scotland, Scotland Survey 2012, Aberdeen & Grampian Factsheet</i>	

TABLE B.8 REASONS FOR CHOOSING TO VISIT ABERDEEN & GRAMPIAN	
Reason	%
Particular interest in scenery/ landscape	28%
Family in area	21%
Particular interest in history of area	20%
Area I know well - been before	19%
Visit a particular attraction	17%
<i>Source: Visit Scotland, Scotland Survey 2012, Aberdeen & Grampian Factsheet</i>	

TABLE B.9 MOST POPULAR ACTIVITIES ABERDEEN & GRAMPIAN	
Activity	%
Visited a historic venue	53%
Short walk/ stroll	51%
Shopping	47%
Sightseeing	46%
Visited a museum/ art gallery	45%
Trying local food	44%
Visited a beach	43%
Visited a country park	42%
Visited cities	39%
Centre based walking	35%
<i>Source: Visit Scotland, Scotland Survey 2012, Aberdeen & Grampian Factsheet</i>	

B.4 Top Visited Attractions

B.4.1 Historic Houses/ Palaces Scotland

TABLE B.10 HISTORIC HOUSES/ PALACES TOP 10 SCOTLAND						
	Attraction	Location	Visits		% Change	Free/ Paid
			2014	2015		
1	Scone Palace	Perth	98,559	91,042	-7.60%	P
2	Glamis Castle	Glamis	84,293	90,340	7.20%	P
3	Inveraray Castle	Inveraray	88,972	88,416	-0.60%	P
4	Dunrobin Castle	Golspie	67,209	72,804	8.30%	P
5	Linlithgow Palace	Linlithgow	63,274	66,324	4.80%	P
6	Skaill House	Orkney	59,684	57,921	-3.00%	P
7	Abbotsford	Melrose	59,408	56,979	-4.10%	P
8	Pollok House	Glasgow	58,918	56,025	-4.90%	P
9	Argyll's Lodging	Stirling	56,508	50,326	-10.90%	P
10	Falkland Palace	Cupar	37,757	42,659	13.00%	P

B.4.2 Aberdeen & Grampian

TABLE B.11 ABERDEEN & GRAMPIAN TOP 20 VISITED ATTRACTIONS							
	Attraction	Location	Type	Visits		% Change	Free/ Paid
				2014	2015		
1	Aden Country Park	Mintlaw	ON	298,368	326,620	9.50%	F
2	David Welch Winter Gardens	Aberdeen	G	300,083	274,713	-8.50%	F
3	Johnston's Cashmere Visitor Centre	Elgin	CR	183,120	186,898	2.10%	F
4	Broadie Castle	Forres	CR	76,627	108,173	41.20%	P
5	Scottish Dolphin Centre	Spey Bay	Z	92,835	91,561	-1.40%	F
6	Dunnottar Castle	by Stonehaven	CR	88,244	89,383	1.30%	P
7	Aberdeen Maritime Museum	Aberdeen	MAG	78,132	71,919	-8.00%	F
8	Mar Lodge Estate	Braemar	ON	33,694	61,595	82.80%	F
9	Logie Steading Visitor Centre	Forres	ON	50,000	59,292	18.60%	F
10	Balmoral Estates	Balater	CR	58,614	57,806	-1.40%	P
11	Muir of Dinnet Nature Reserve	Dinnet	ON	44,657	56,328	26.10%	F
12	Culbin Forest & Shore	by Forres	ON	55,261	55,642	0.70%	F
13	Bennachie Forest	Inverurie	ON	58,882	54,424	-7.60%	F

**TABLE B.11
ABERDEEN & GRAMPIAN TOP 20 VISITED ATTRACTIONS**

	Attraction	Location	Type	Visits		% Change	Free/ Paid
				2014	2015		
14	Satrosphere	Aberdeen	MAG	46,635	51,220	9.80%	P
15	Grampian Transport Museum	Alford	MAG	43,774	50,838	16.10%	P
16	Macduff Marine Aquarium	Macduff	Z	47,832	49,877	4.30%	P
17	Braeloigne Visitor Centre	by Aboyne	ON	45,000	45,000	0.00%	F
18	Glenshee Ski Centre	Glenshee	AA	64,160	43,240	-32.60%	P
19	Crathes Castel	Banchory	CR	37,975	42,311	11.40%	P
20	St Cyrus Nature Reserve	nr Montrose	ON	40,309	37,573	-6.80%	F

Source: Moffat Centre, Visitor Attraction Monitor 2015

B.4.3 Aberdeen City

**TABLE B.12
ABERDEEN CITY TOP 10 ATTRACTIONS**

	Attraction	Location	Type	Visits			Admission Free/ Paid
				2014	2015	% Change	
1	David Welch Winter Gardens		G	300,083	274,713	-8.50%	F
2	Aberdeen Maritime Museum		MAG	78,132	71,919	-8.00%	F
3	Satrosphere		MAG	46,635	51,220	9.80%	P
4	Cathedral Church of St Machar		WS	21,149	23,222	9.80%	F
5	Tolbooth Museum		MAG	23,406	20,750	-11.30%	F
6	Gordon Highlanders Museum		MAG	5,789	5,888	1.70%	P
7	King's Museum		MAG	6,472	5,780	-10.70%	F
8	Cathedral Church of St Andrew		WS	2,326	2,100	-9.70%	F

Source: Moffat Centre, Visitor Attraction Monitor 2015



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Question 2 attachment - pshpostcodes

Answer
AB10 1TD
AB12 3EG
AB21 9NE
ab24 3hu
AB32 6SF
AB13 0EN
AB12 4QA
AB21 7EJ
AB23 8PT
AB39 8AF
AB15 9BU
AB51 0DG
ab24 4ll
AB25 3UH
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AB12 5NR
AB10 1JG
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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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AB10 7BH

Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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AB21 9HY
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AT13 7GD
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AB21 7ER
AB23 8FX
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Question 2 attachment - pshpostcodes

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AB10 6JY
AB25 1EG
AB10 6RE
AB24 3PF
AB15 4ES
AB34 5LW
Eh6 6aa
AB12 3FA
AB25 1FA
11228
AB15 4AA
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AB24 5HY
AB12 3QB
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DD10 8PQ
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AB24 2EW
AB21 9NU
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Question 2 attachment - pshpostcodes

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AB51 5JG
AB24 4AY
AB16 6TP
Ab15 7qe
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AB15 7SU
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KW17 2PH
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AB12 5RU
SE5 8RH
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AB51 0SY

Question 2 attachment - pshpostcodes

AB15 9FA
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Question 2 attachment - pshpostcodes

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KY15 4BH
Ab21 9nw

Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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Question 2 attachment - pshpostcodes

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AB11 6BX
AB16 5ND
AB22 8RY
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Question 2 attachment - pshpostcodes

AB24 4HU
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AB41 7GB
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Question 2 attachment - pshpostcodes

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AB15 9FX
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Question 2 attachment - pshpostcodes

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AB15 9TY
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AB16 6XY

Question 2 attachment - pshpostcodes

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AB16 5PN
AB16 6TH
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AB16 7EY
AB21 0SH
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AB10 6JR
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AB15 9DT
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Question 2 attachment - pshpostcodes

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AB43 7AG
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AB10 6JL
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Ab15 4 Ap

Question 2 attachment - pshpostcodes

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BT19 1JU
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Question 2 attachment - pshpostcodes

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AB10 1ta

Question 2 attachment - pshpostcodes

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FK12 5PA
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Eh497aj
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AB15 7ST
AB14 OPD
W5 4j r
KA12 OPT / AB15 4UP
AB41 7LZ
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AB32 6NY
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AB119BD
SW6 1QA
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N1 OHD
AB31 5DY
AB22 8SU
EC1V 9BF
SK4 4RL
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AB15 4YT
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AB15 8GD
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Question 2 attachment - pshpostcodes

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AB24 5ER
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DD9 6DG
ab15 9qe
AB14 OPU
AB22 8 LY
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AB117TF
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AB159FB
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AB39 2NG
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Ky11 4st

Question 2 attachment - pshpostcodes

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Ky11 4st
Ab12 4xy
Ab12 4xy
Ab12 4ah
Ab12 4ah
Ab15 7qt
Ab15 9se
Ab15 9se
Ab14 0wf
Ab14 0wh
Ab15 5j l

INTERNATIONAL TRAILBLAZERS

"The idea that you could change the world from your bedroom was pretty compelling to me."

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sectetur adipiscing elit. vehicula ut id elit. Aenean euismod lacus. Nulla vitae

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