Scotland Visitor Survey 2015

Two Year Survey - Year One Results

March 2016

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Introduction

❖ **VisitScotland regularly undertake Scotland-wide visitor surveys**

❖ Past surveys have been undertaken in 2004/2005, 2007/2008 and 2011/2012

❖ The content of the survey is updated each time to reflect consumer and market changes at the current time. Each time, the survey explores different areas of the visitor experience

❖ **The 2015/2016 Scotland Visitor Survey is a 2 year research programme covering 19 regions of Scotland. The 2 year programme is required to gain robust sample sizes for reporting at a regional level**

❖ The Scotland Visitor Survey is a **summer only survey**, and due to the scale of the project , it is not carried out for the full year. As such the results reflect the views of the main holiday season visitors who were in Scotland during May-September.

Interviewing conducted in all regions in 2015 <u>and</u> 2016.
Delivering full 'Scotland' results each year plus regional results at the end of year 2.

- Research extended to include islands locations

- Fieldwork conducted using mobile van research

- No interviewing at VIC locations

- Greater focus on key topics

  (quality of visitor experience, digital behaviour, travel reviews, Wi-Fi and connectivity, accessibility needs)

The visitor survey will be conducted again in 2016. In early 2017 there will be 2016 Scotland results available plus combined 2015/16 regional factsheets.

Objectives

The main objective for this survey was to understand <u>visitors to Scotland</u> through the analysis of their behaviour and an understanding of their visitor experience.

❖ The insights gained from the survey feed into the development of business and marketing strategies for VisitScotland which aims to maximise the number of visitors and spend to Scotland.

❖ The survey focuses on expanding the understanding of visitors to Scotland in terms of:

- the visitor journey
- motivations to visit Scotland and expectations of the quality of experience
- visitor behaviour across many areas of the visitor experience
- satisfaction with key aspects of a trip in Scotland
- the role of technology at different stages of the customer journey

❖ Additionally, the study is also expected to deliver the following benefits to the Scottish tourism industry:

- Inform product and marketing development for tourism businesses

- Enable tourism businesses to identify opportunities and threats for their marketing and business planning

- Provide Destination Marketing Organisations and local authorities with benchmark/comparison figures for more localised surveys (at the end of the two year study)

Methodology: on tour

Methodology details

Stage 1

- 5 min survey in research van
  - Self completion on iPads
  - Up to 8 visitors at a time
  - Survey offered in 5 languages
- **66 locations** across Scotland
  - Sampling plan devised based on GBTS / IPS data
- Ongoing fieldwork across 17 weeks, May-Sept 2015
  - Road trip approach
  - 1 day per location; multiple sampling points per region
  - Each region visited several times during fieldwork period
- Sample comprises leisure overnight visitors only

Stage 2

- 20 min online survey
  - Mailed 2 weeks after stage 1 interview
  - Sent in language chosen at stage 1
- Visitors answered questions about Scotland as a whole and up to 2 individual regions
- Fieldwork ongoing June-Nov 2015
- Reminders sent to those who had not completed after 2 and 4 weeks and in Nov
- **Response rate 27%**
- Data weighted to match GBTS / IPS stats on two key measures:
  - Location visited
  - Domestic vs International visitors
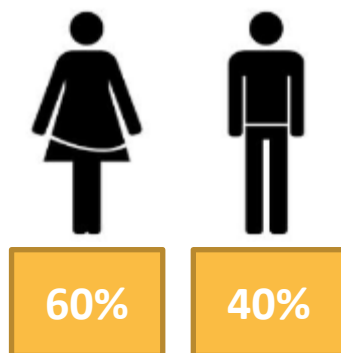
5,947 visitors

1,608 visitors

Using & Interpreting the Scotland Visitor Survey 2015

- **The Scotland Visitor Survey should not be viewed in isolation**. The survey collates views on a wide range of topics to supplement data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level by;
    - The Great Britain Tourism Survey (GBTS) which estimates the volume and value of **domestic** tourism - from within Scotland and the rest of Great Britain
    - The International Passenger Survey (IPS) which provides details of tourism from **abroad**

- The Scotland Visitor Survey is designed to understand visitor attitudes and behaviours across a range of measures.

- The Scotland Visitor Survey is undertaken during high season only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Scotland between May and September 2015 only.

- The sample comprises **leisure overnight visitors only**, and as such the following are excluded: visitors on a day trip from home, those on a business trip, cruise ship visitors

Scotland Visitor Survey 2015 sample profile

Leisure overnight visitors in Scotland May-Sept 2015

Gender

60% 40%

Age

- 65+, 13%
- 16-24, 10%
- 25-34, 13%
- 35-44, 15%
- 45-54, 22%
- 55-64, 25%
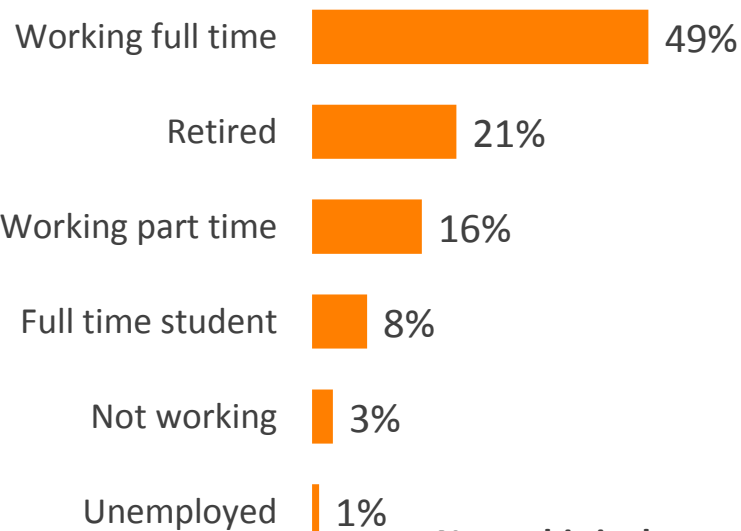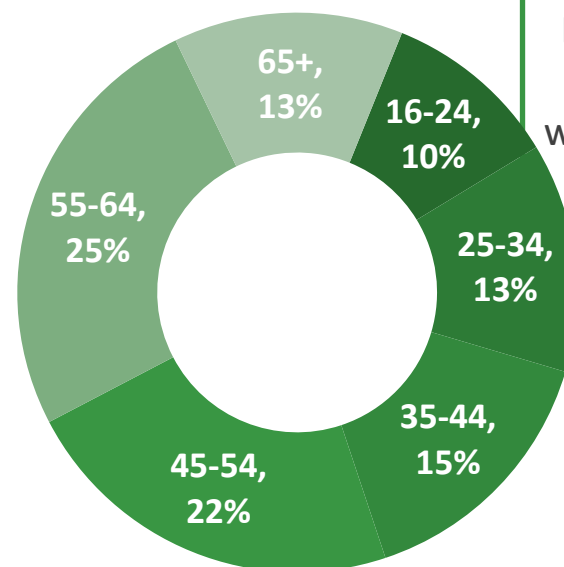
34% European visitors were under 34yrs
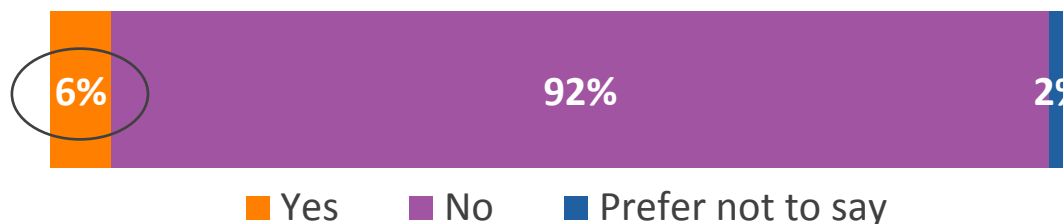
Working status

Working full time	49%
Retired	21%
Working part time	16%
Full time student	8%
Not working	3%
Unemployed	1%

Accessibility Needs

6% 92% 2%

■ Yes ■ No ■ Prefer not to say

Base: S2 All (1608)

Note: this is the profile of the survey sample only. For info on overall profile of visitors to Scotland use GBTS/IPS and Tourism in Scotland factsheet

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Visitor's home country

Scotland **25%**

England **48%**

Wales **1%**

N Ireland **1%**

Germany **3%**

France **2%**

RoI **1%**

Spain **1%**

Italy **1%**

Netherlands **1%**

USA **4%**

Canada **3%**

Australia **3%**

Another country 6%

Domestic – 75%
International – 25%

Note: this is the profile of the survey sample only. For info on overall profile of visitors to Scotland use GBTS/IPS and Tourism in Scotland factsheet

*Note: data weighted to reflect GBTS/IPS proportions on international vs domestic visitors
Base: S2 All (1608)

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Most visitors, particularly domestic, were travelling with their partner / spouse or other family members (including children and parents)

Alone 6%

Partner / spouse 55%

Child(ren) 21%

Parents / partner's parents 10%

Other family members 15%

Friends 19%
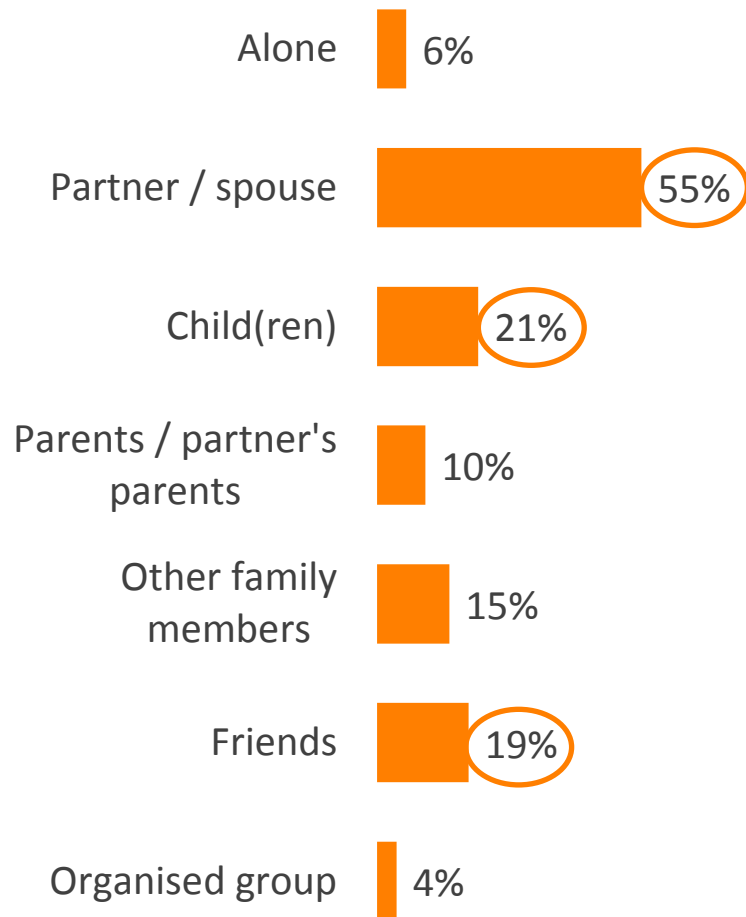
Organised group 4%

- **UK visitors (from outside Scotland)** are most likely to be travelling with their partner/ spouse

- **Visitors from the Rest of the World** were more likely than others to be travelling alone (9%) or in an organised group (9%)

- **Scottish residents and repeat visitors** were most likely to have children in their party (25%, 24%)

- **Visitors from Europe** and **1st time visitors** were most likely to be with friends (23% both)

Q3 Which of the following best describes who is with you on your trip?
Base: S1 All (5947)

First time vs repeat visitors

Just a quarter were visiting Scotland for the first time, whilst a third were regular visitors, particularly those visiting from within the UK

Scots 66%

Europe 64%
Rest of World 59%

Take breaks in Scotland regularly, 34%

1st time, 24%

Been once before, 12%

Been several times before, 31%

Rest of UK 49%

First Time Visitors – 24%
Repeat Visitors – 76%

Q5 Is this the first time you have taken a holiday or short break in Scotland?
Base: S1 All (5947)
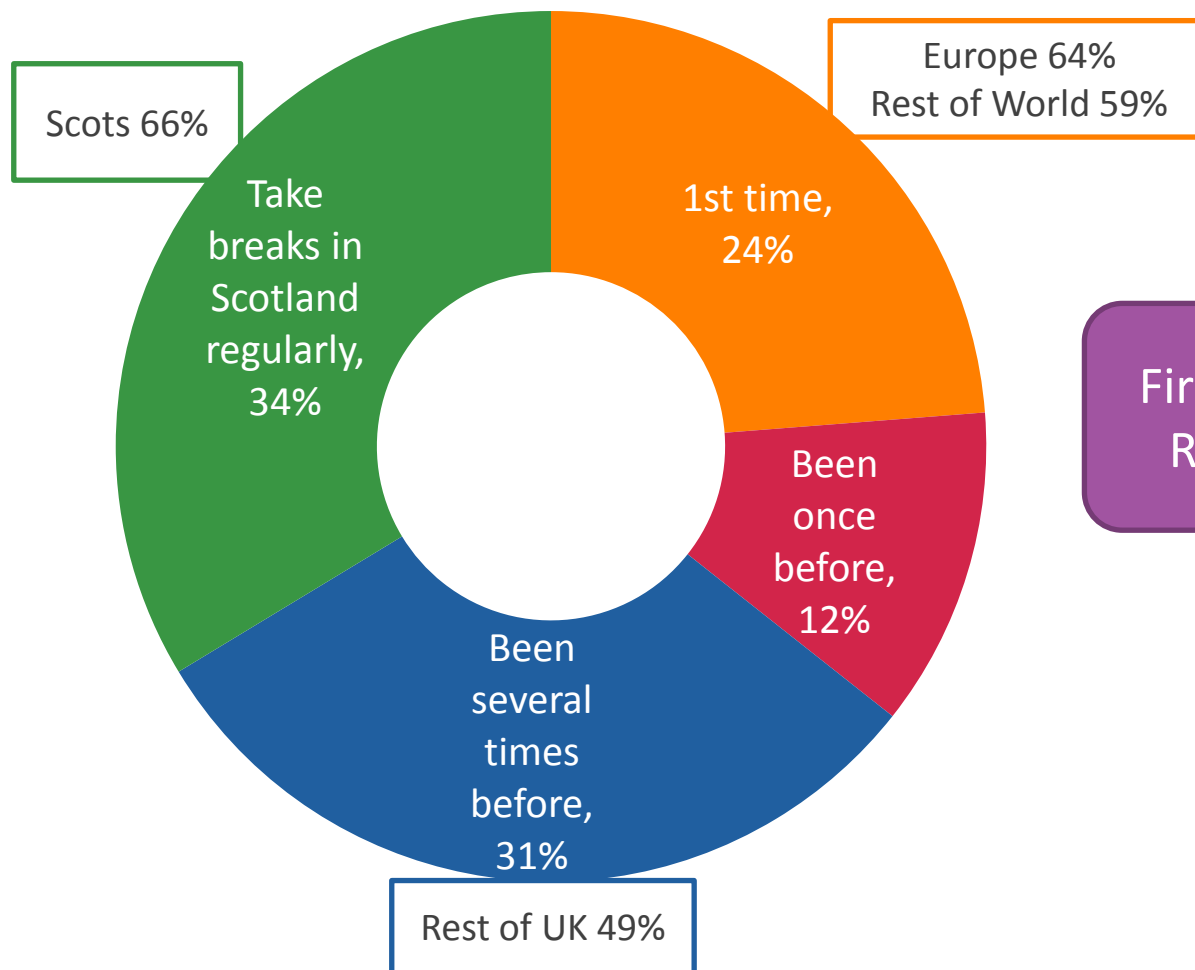
Rest and be Thankful, near Arrochar, Argyll

What attracts visitors to Scotland?

Scotland's scenery, landscape, history & culture are major draws for visitors

Attraction	%
The scenery & landscape	49%
The history & culture	32%
Holidayed before & wanted to return	26%
To get away from it all	22%
To visit family / friends who live in Scotland	22%
It is easy to get to	15%
Closeness to home	15%
Scotland's reputation for friendly people	15%
The range of activities available	14%
Special event	13%
To visit cities	13%
I have always wanted to visit	13%
Personal event / celebration	10%
To visit a particular attraction	10%
My Scottish ancestry	9%
The climate & weather	5%

The climate & weather 5% → Driven by Europeans 12%

Thinking broadly about your decision to choose Scotland for your holiday or short break, what was it that attracted you to spend your holiday / short break in Scotland on this occasion?
Base: S1 All (5947)

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What persuaded visitors to spend holiday in Scotland?

Word of mouth recommendation and a desire to holiday at home are also influential in persuading visitors to choose Scotland.

- Recommended by friends / relatives / colleagues — **24%**
- Wanted to holiday at home rather than abroad — 21%
- Found a good deal / special offer — **8%**
- Traveller review websites — **6%**
- Price of hotels / accommodation — 5%
- Seeing something on social media about Scotland — 4%
- Price of airline tickets — 2%
- Direct advice from travel agent / tour operator — 1%
- Good exchange rates — 0%
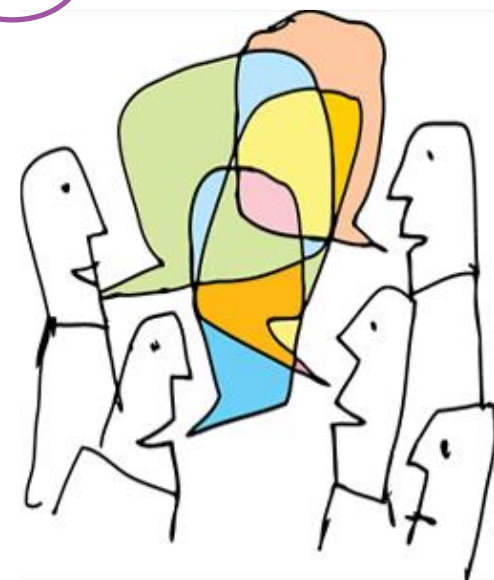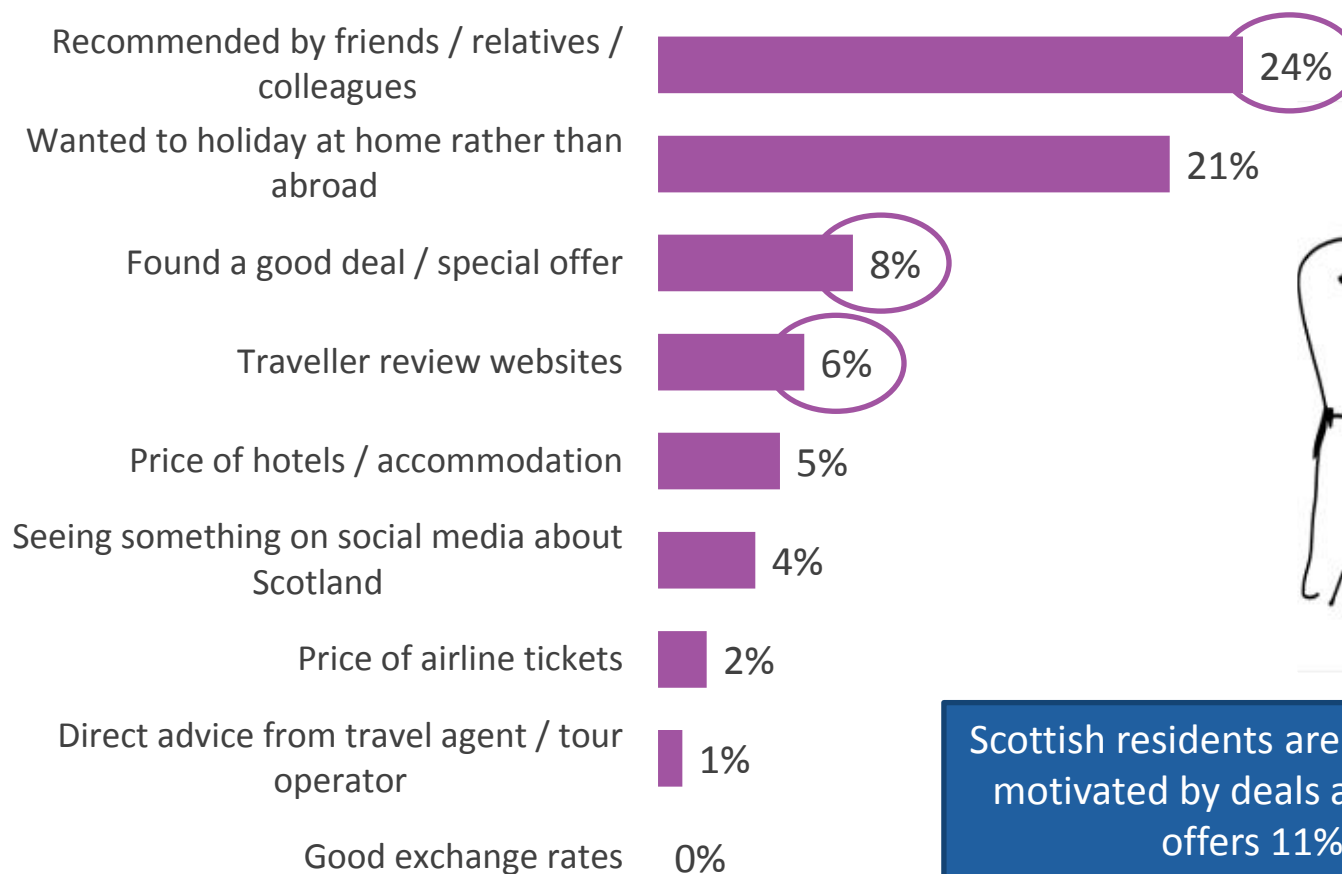
Scottish residents are particularly motivated by deals and special offers 11%.
Travel review sites influential even at early motivation stage.

Which of the following persuaded you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (5947)

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What prompted visitors to consider Scotland?

Online and offline media, particularly travel features and TV programmes have a role to play in prompting consideration

Travel feature about Scotland	10%
TV programme about Scotland	9%
Book about / set in Scotland	7%
Movie / film featuring Scotland	7%
Watching / reading about Scottish people in media/news	5%
Inspired by online video content about Scotland	4%
Watching / attending other events hosted in Scotland	3%
Inspired by marketing / PR / advert about Scotland	3%
Coverage in news of Scottish referendum in 2014	3%
Watching / attending Commonwealth Games 2014	2%
Watching / attending Ryder Cup 2014	1%

Did any of these prompt you to consider Scotland for this trip? Base: S1 All (5947)

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Inspirational Film, TV & Books

Whether set in or about Scotland film, TV and books are an important source of inspiration, especially for international visitors

Base: 120

TV programme about Scotland (529) — **9%**

BBC Alba Shetland Coast Travel programme Rick Stevens Springwatch Monarch of the Glen Taggart Neil Oliver Countryfile Still Game Outlander

Base: 221

Movie / film featuring Scotland (424) — **7%**

Local Hero One Day Braveheart Skyfall Angels Share Outlander Trainspotting Rob Roy Brave Highlander Harry Potter

Base: 121

Book about / set in Scotland (408) — **7%**

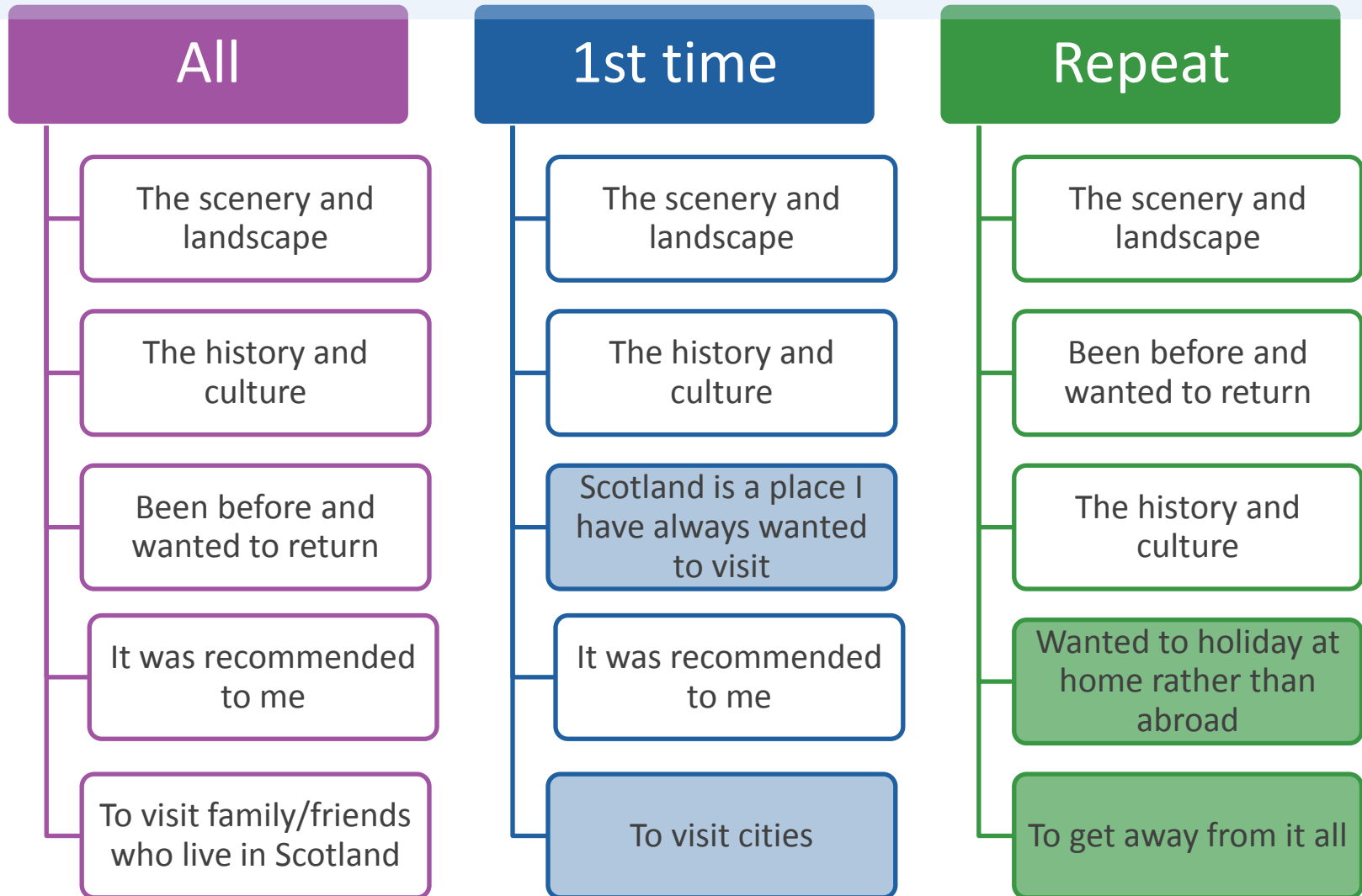Ian Rankin Harry Potter Lewis Trilogy Blackhouse Kidnapped Walter Scott Outlander

Q10 Thinking broadly about your decision to choose Scotland for your holiday or short break, what first prompted you to consider Scotland for this trip? Base: S1 All (5947)
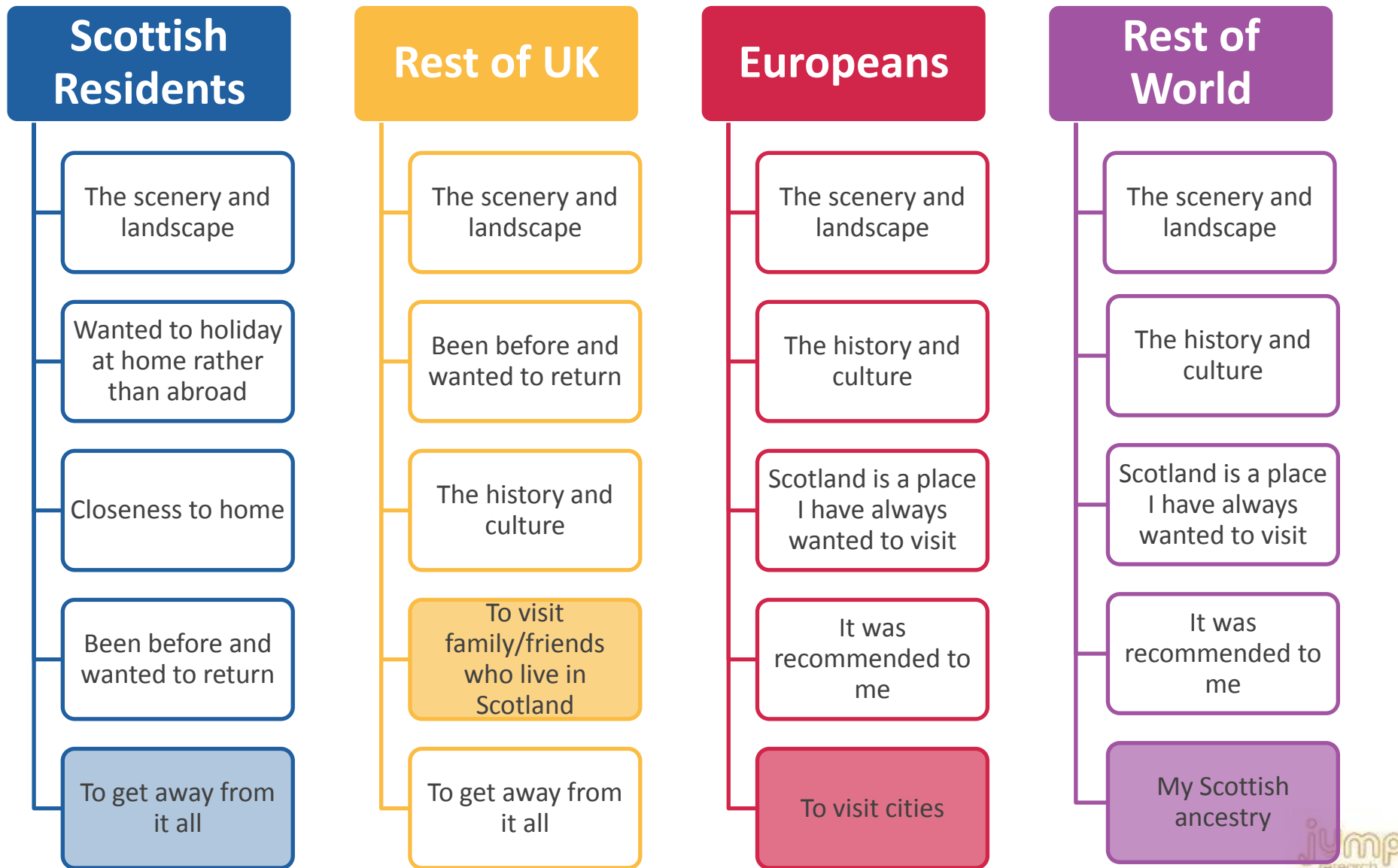
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Top 5 motivations by visitor type

1st time visitors have a latent desire to visit and are attracted by combination of natural beauty and urban culture; whilst repeat visitors look for seclusion close to home

All	1st time	Repeat
The scenery and landscape	The scenery and landscape	The scenery and landscape
The history and culture	The history and culture	Been before and wanted to return
Been before and wanted to return	Scotland is a place I have always wanted to visit	The history and culture
It was recommended to me	It was recommended to me	Wanted to holiday at home rather than abroad
To visit family/friends who live in Scotland	To visit cities	To get away from it all

Base: S1 All (5947); 1st time visitors (2052); Repeat visitors (3895)

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Top 5 motivations by market

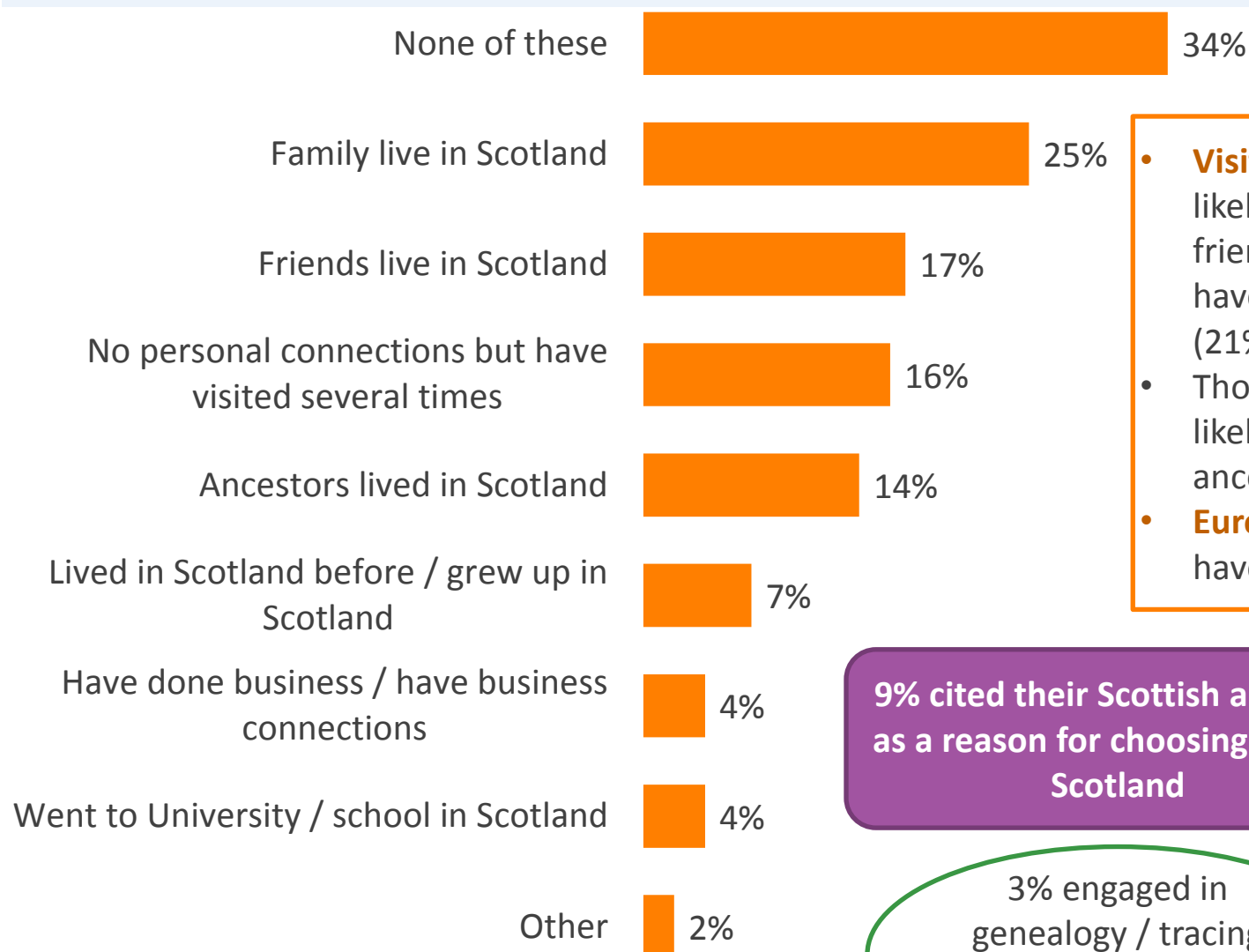| Scottish Residents	Rest of UK	Europeans	Rest of World
The scenery and landscape	The scenery and landscape	The scenery and landscape	The scenery and landscape
Wanted to holiday at home rather than abroad	Been before and wanted to return	The history and culture	The history and culture
Closeness to home	The history and culture	Scotland is a place I have always wanted to visit	Scotland is a place I have always wanted to visit
Been before and wanted to return	To visit family/friends who live in Scotland	It was recommended to me	It was recommended to me
To get away from it all	To get away from it all	To visit cities	My Scottish ancestry

Base: S1 Scots (1514); Rest of UK (1666); Europeans (1199); Rest of World (1035)

Connections to Scotland

66% of visitors had an existing connection to Scotland

Connection	%
None of these	34%
Family live in Scotland	25%
Friends live in Scotland	17%
No personal connections but have visited several times	16%
Ancestors lived in Scotland	14%
Lived in Scotland before / grew up in Scotland	7%
Have done business / have business connections	4%
Went to University / school in Scotland	4%
Other	2%

- **Visitors from Rest of UK** most likely to have family (32%) or friends (20%) in Scotland or to have visited several times (21%).
- Those from **Rest of World** most likely to mention Scottish ancestors (32%).
- **European visitors** least likely to have a connection (65%).

**9% cited their Scottish ancestry as a reason for choosing to visit Scotland**

3% engaged in genealogy / tracing ancestors whilst in Scotland

Q8 Before your trip, did you already have a personal connection with Scotland?
Base: S1 All except Scots (4433);

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Planning behaviour

Closely linked to distance travelled, with international visitors planning more, and further ahead, than domestic visitors

I like to plan & book all aspects of my holiday before I travel, rather than leaving it until I get to my destination

| 6% | 6% | 9% | 10% | 17% | 13% | 11% | 11% | 8% | 9% |

Mean

5.7

■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly
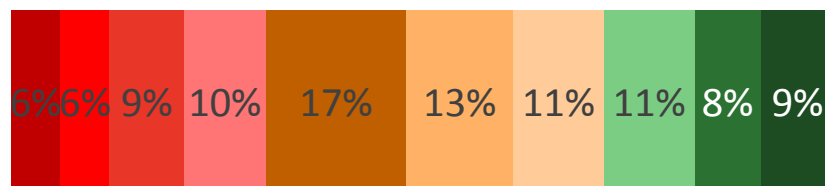
Highest for visitors from Rest of World (6.55) and Europe (6.03)

Starting to think about & plan this trip

| 5% | 24% | 30% | 20% | 12% | 9% |
| >1 year | 6mths – 1 year | 3-6 months | 1-2 months | 2-4 weeks | <2 weeks |
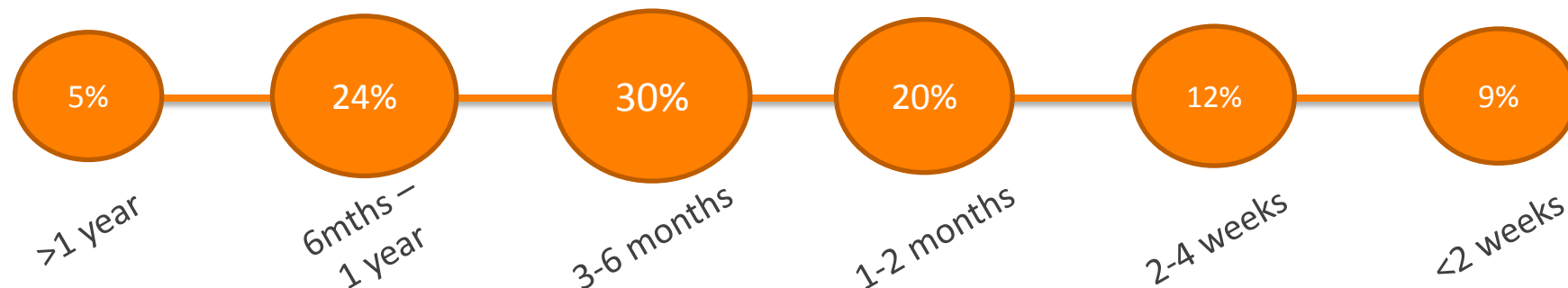
Long haul visitors prefer to plan well ahead 19% >1 year; 37% 6mths-1year in advance

35% of European visitors plan 3-6 months ahead

35% of Scots plan less than a month in advance

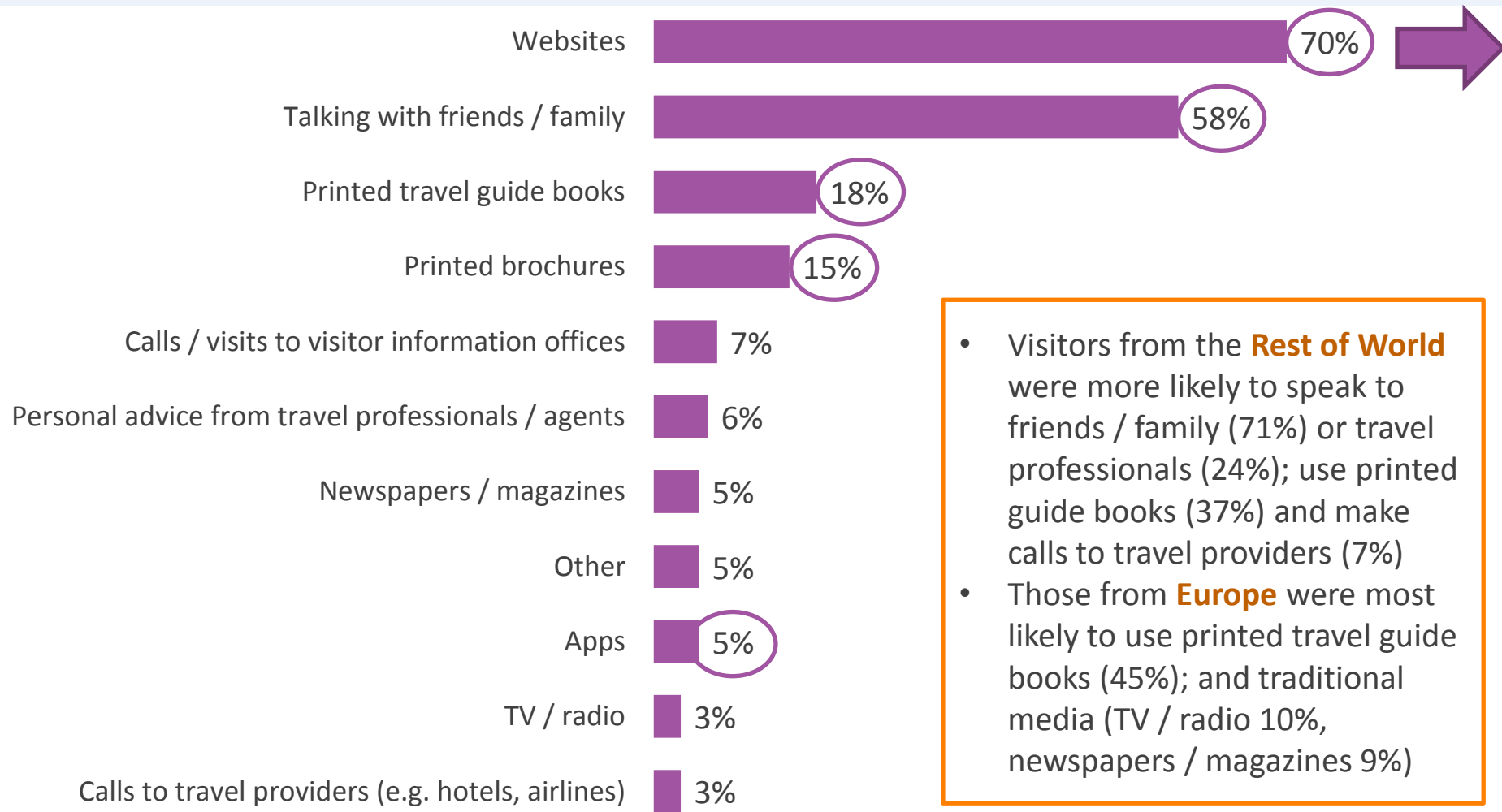Average planning time = 21 weeks in advance

Q8 How far in advance did you start thinking about and planning this trip?
Q45c To what extent do you agree or disagree with the following statements about holidays in general?
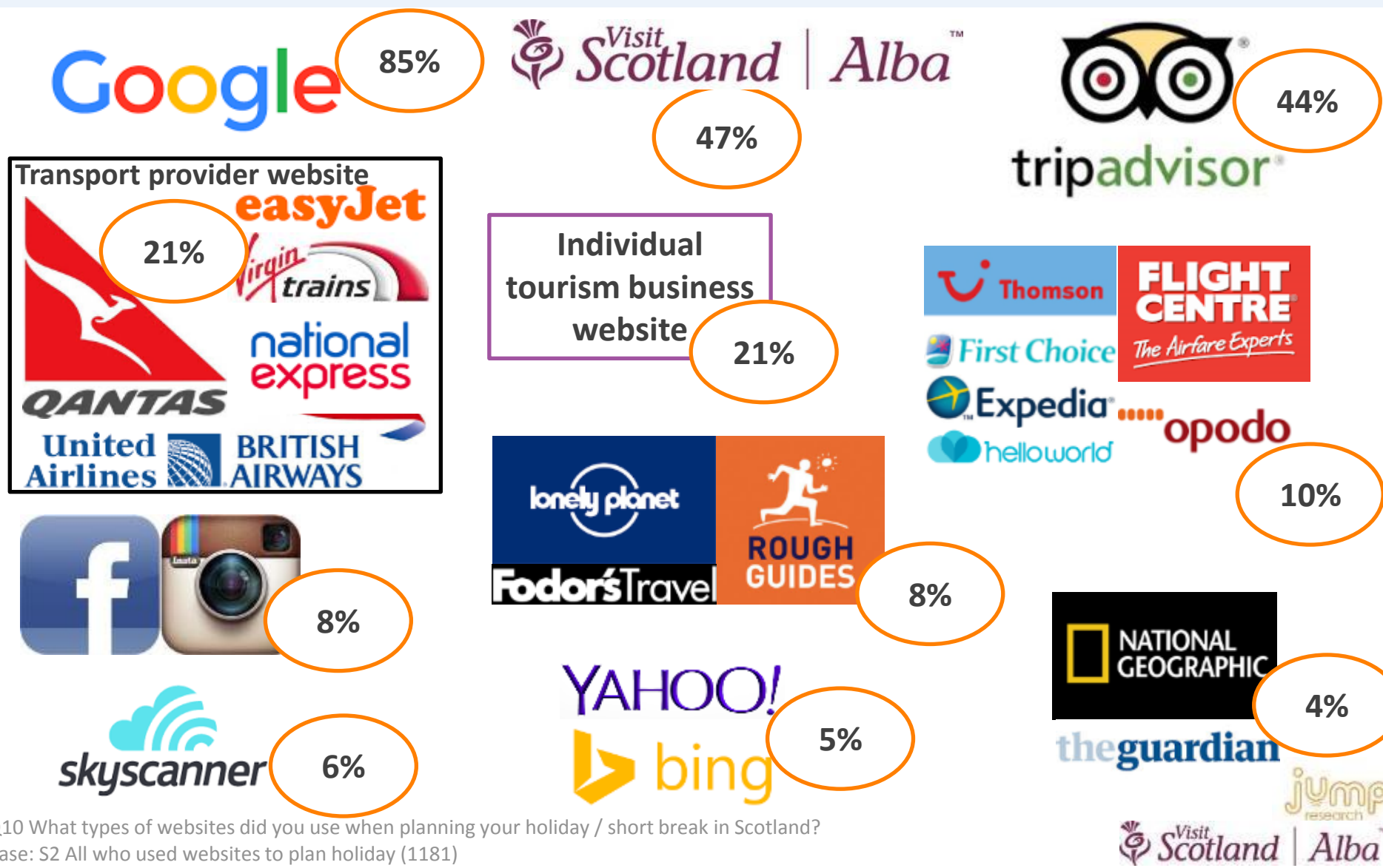Base: S2 All (1608)

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Information sources used to plan visit

Websites dominated the planning process, although advice from friends & family was also important and printed materials featured for some

Source	%
Websites	70%
Talking with friends / family	58%
Printed travel guide books	18%
Printed brochures	15%
Calls / visits to visitor information offices	7%
Personal advice from travel professionals / agents	6%
Newspapers / magazines	5%
Other	5%
Apps	5%
TV / radio	3%
Calls to travel providers (e.g. hotels, airlines)	3%

- Visitors from the **Rest of World** were more likely to speak to friends / family (71%) or travel professionals (24%); use printed guide books (37%) and make calls to travel providers (7%)
- Those from **Europe** were most likely to use printed travel guide books (45%); and traditional media (TV / radio 10%, newspapers / magazines 9%)

Q9 Which of the following sources of information were helpful when planning your holiday / short break in Scotland? Base: S2 All (1608)

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Types of websites used for planning

Google dominated online planning, with visitscotland.com and travel review sites also important

Google — 85%

Visit Scotland | Alba — 47%

tripadvisor — 44%

Transport provider website (easyJet, Virgin trains, national express, QANTAS, United Airlines, BRITISH AIRWAYS) — 21%

Individual tourism business website — 21%

Thomson, FLIGHT CENTRE, First Choice, Expedia, helloworld, opodo — 10%

facebook, Instagram — 8%

lonely planet, Fodor's Travel, ROUGH GUIDES — 8%

skyscanner — 6%

YAHOO!, bing — 5%

NATIONAL GEOGRAPHIC, theguardian — 4%

Q10 What types of websites did you use when planning your holiday / short break in Scotland?
Base: S2 All who used websites to plan holiday (1181)

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Top 5 websites by market

Scots	Rest of UK	Europeans	Rest of World
Google	Google	Google	Google
tripadvisor	Visit Scotland — Scotland's National Tourism Organisation / Buidheann Turasachd Nàiseanta na h-Alba	Visit Scotland — Scotland's National Tourism Organisation / Buidheann Turasachd Nàiseanta na h-Alba	tripadvisor
Visit Scotland — Scotland's National Tourism Organisation / Buidheann Turasachd Nàiseanta na h-Alba	tripadvisor	tripadvisor	Visit Scotland — Scotland's National Tourism Organisation / Buidheann Turasachd Nàiseanta na h-Alba

Individual tourism business website

Transport provider website
easyJet, Virgin trains, national express, QANTAS, United Airlines, BRITISH AIRWAYS (Scots and Rest of UK columns)

Transport provider website
easyJet, Virgin trains, national express, QANTAS, United Airlines, BRITISH AIRWAYS (Europeans and Rest of World columns)

lonely planet, Fodor's Travel, ROUGH GUIDES (Europeans and Rest of World columns)

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Types of online information used for planning

User generated feedback was important to visitors, particularly reviews and ratings

Traveller submitted reviews / ratings — **60%**

Interactive maps displaying accommodation & attractions — **34%**

Traveller submitted photos — **25%**

Professional photos — **22%**

Professional reviews / ratings — **21%**

Company info / promotions on social media — **15%**

Comments / posts from people on social media — **14%**

Professional videos — **3%**

Traveller submitted video content — **3%**

Did not use this type of content — **19%**

Visitors from Europe and the Rest of World were much more likely to use each of these information types.

Scottish residents were more likely to use company promotions on social networks (19%) for planning trips perhaps linked to deal searching – cited earlier as a prompt for Scots to consider taking a break in Scotland

Q11 And what types of online information did you use when planning your holiday / short break in Scotland?
Base: S2 All who used websites to plan holiday (1181)

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Planning & Booking Timeline

Starting to think about & plan this trip

>1 year	6mths - 1 year	3-6 months	1-2 months	2-4 weeks	<2 weeks
5%	24%	30%	20%	12%	9%

Average = 21 weeks in advance

Booking accommodation

10% didn't book in advance

>6 months	3-6 months	1-2 months	2-4 weeks	<2 weeks	On arrival
15%	26%	18%	14%	10%	3%

Average = 15 weeks

Booking transport to Scotland

27% didn't book in advance

>6 months	3-6 months	1-2 months	2-4 weeks	<2 weeks	On arrival
8%	24%	17%	11%	7%	3%

Average = 10 weeks

Base: S2 All (1608)
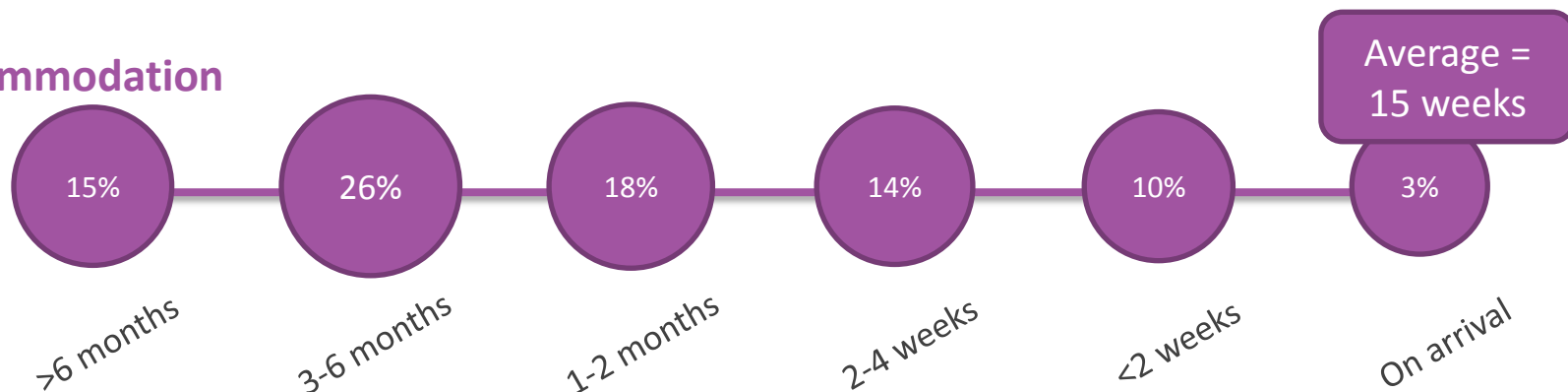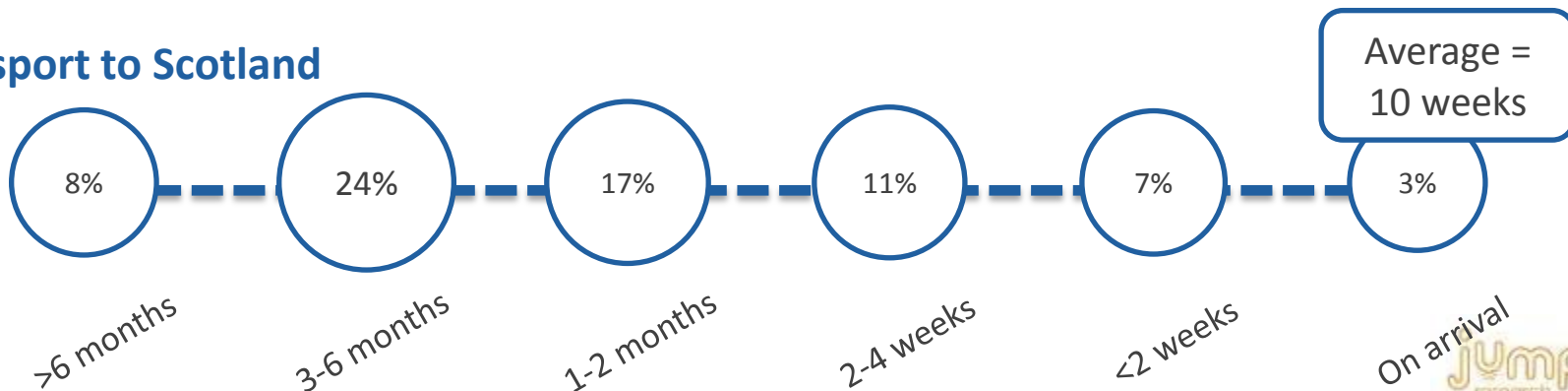
Booking transport to Scotland

Travel booking behaviour differed greatly by distance travelled – the greater the distance, the earlier the booking.

Booking transport to Scotland

27% didn't book in advance

>6 months	3-6 months	1-2 months	2-4 weeks	<2 weeks	On arrival
8%	24%	17%	11%	7%	3%
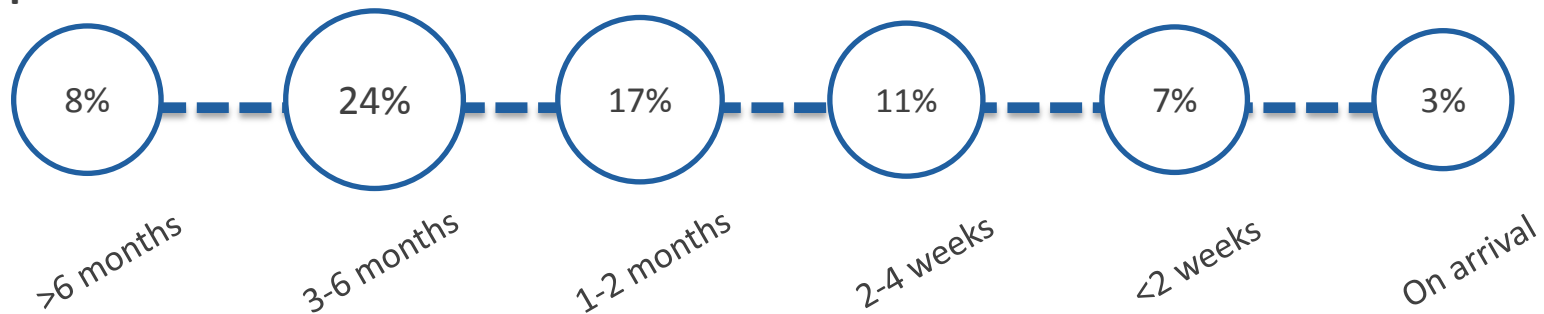
- Over two fifths of Scottish (42%) & a third of Rest of UK (34%) visitors did not book travel in advance.
- Visitors from Rest of World tend to book more than 3mths in advance (64%)

Average = 10 weeks in advance

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Booking accommodation

Similarly, advance accommodation booking was closely linked to distance of travel

Booking accommodation

10% didn't book in advance

>6 months	3-6 months	1-2 months	2-4 weeks	<2 weeks	On arrival
15%	26%	18%	14%	10%	3%
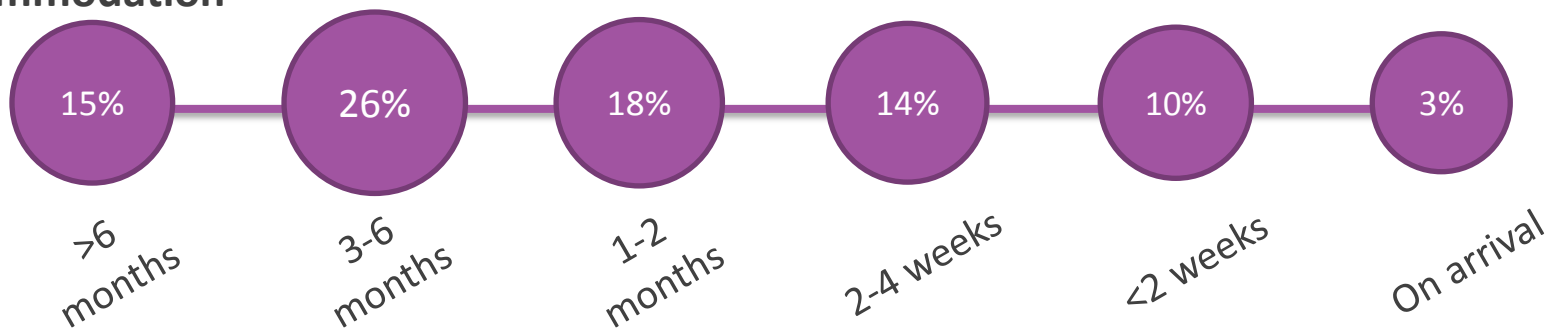
61% of visitors from the Rest of the World book more than 3mths ahead

31% of Scottish residents book within a month of travel

Average = 15 weeks in advance

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Travel & accommodation booking methods

Majority of visitors booked travel and accommodation separately. Those who booked together tended to do so online via travel and tour operator websites.

Booked Travel & Accommodation Together

No, 87%

Yes, 13%

20% of first time visitors booked together

How Booked

Online via travel website	30%
Tour operator / travel company website	23%
High street travel agent	13%
Small / independent agent	7%
Direct with accommodation	6%
By email	5%
By phone	5%
Other	9%
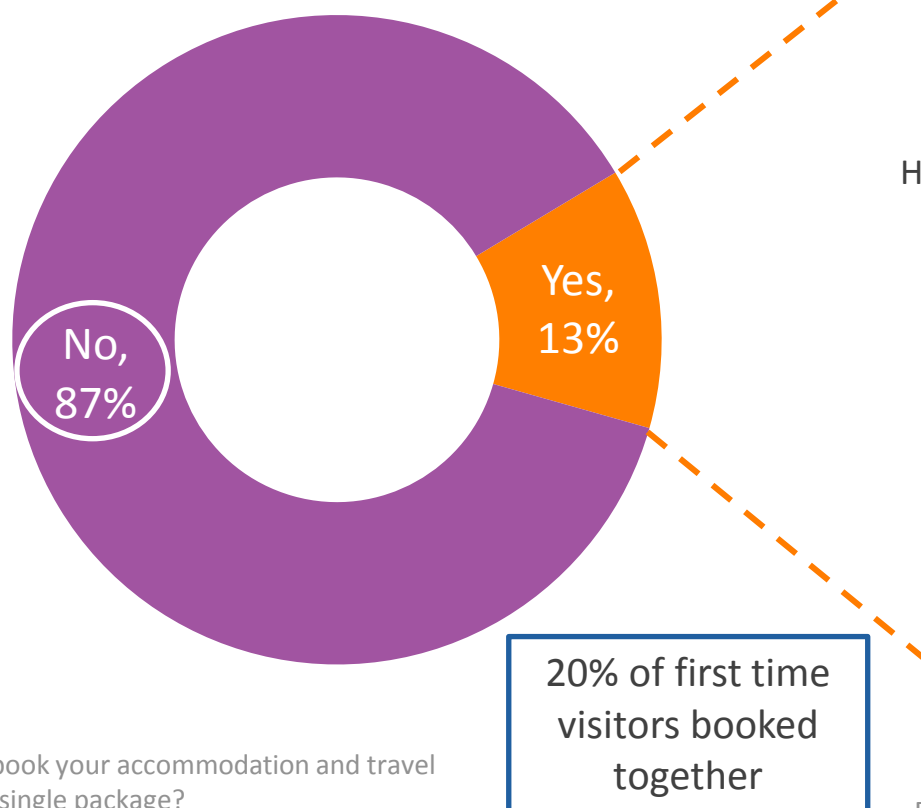
Q13 Did you book your accommodation and travel together as a single package?
Q13b How did you book?
Base: S2 All who booked in advance (1396)

Base: S2 All who booked travel & accommodation together (196)

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Travel & accommodation booking methods

For those who booked separately, booking direct with accommodation or transport providers was the most common approach

Accommodation

Method	%
Accommodation website	39%
Online via travel website	16%
Accommodation by phone	13%
Accommodation by email	12%
Online via peer-to-peer booking site	4%
Tour operator / travel company website	2%
High street travel agent	1%
Tourist information centre	0%
Other	1%
Didn't book accommodation	11%

Travel

Method	%
Transport provider website	61%
Other	23%
Online travel agent	10%
Tour operator / travel company website	3%
High street travel agent	2%
Don't know	1%

Q13c How did you book your accommodation for this trip? Base: S2 All who booked travel & accommodation separately (1200)
Q14 How did you book the travel from home to your destination in Scotland for this trip? Base: S2 All who did book travel & booked separately (514)*

Choosing accommodation

Location & value remain key decision factors when choosing accommodation, but availability of free WiFi is 3rd factor

Factor	%
Location	78%
Value for money	56%
Free wifi	28%
Quality star grading	23%
Previous experience	19%
Specific room arrangements	11%
Specific facilities	11%
Restaurant / quality of food	9%
Accessibility provisions	5%
Pet friendly	4%
Childcare provisions / facilities	3%
LGBT friendly	2%
Other	6%

- Value for money (63%); free WiFi (45%) and quality star grading (35%) are particularly important for Rest of the World visitors
- Value for money (67%) Free WiFi (36%) for visitors from Europe
- Scottish residents are particularly interested in availability of specific facilities (15%) and restaurant / food quality (14%)
- Previous experience is important for Scots (28%) and other UK visitors (20%)

Note: quality star grading was not a specified QA scheme

Q20 Which of the following aspects, if any, were important in helping you choose your accommodation?
Base: S2 All who didn't only stay in second home or with friends / family (1448)

Before Trip – Key Takeouts

Takeouts

- Complex mix of influences attract visitors to Scotland
  - Scotland's natural assets are key across markets
  - Closeness to home & potential for seclusion important for domestic markets
  - But impact of personal recommendation is significant
  - And early inspiration through various media channels plays an important background role

Implications

- Marketing messages should showcase core assets
  - Landscape, history, culture
- Potential to upweight messages around ease of reach to domestic visitors
- Encourage advocacy amongst repeat visitors

Before Trip – Key Takeouts

Takeouts

- Planning & booking timeline strongly correlates to distance travelled
- Most planning done online – Google is first port of call
  - Advice from family / friends is also important and printed materials remain in the mix
- Booking of accommodation and transport often done direct with providers
  - mostly online
- Availability of free WiFi is increasingly important in determining accommodation choice

Implications

- International markets need information earlier
- Domestic markets, particularly Scots open to late deals
- SEO important for VisitScotland and individual tourism businesses
- Websites are required even for small providers
- Provision of free WiFi will help accommodation businesses attract visitors.

During Trip

Merchant City, Glasgow

The majority of visitors spent their whole time in Scotland. Those visiting as part of a longer holiday tended to be from further afield

80% spent whole time in Scotland

20% visited Scotland as part of a longer trip including other destinations

These were most likely to be visitors from the Rest of World (62%); and 1st time visitors (33%)

Q4 Is your holiday/short break in Scotland part of a longer holiday which includes time in other places, or will you spend your whole time in Scotland?
Base: S1 All (5947)

Travel to Scotland was primarily by own car (domestic) or plane (international), depending on where visitors were travelling from

Mode	Percentage
Own car	37%
Plane (direct)	28%
Train (within UK)	15%
Plane (indirect)	11%
Hire car	7%
Boat / ship / ferry	6%
Friend / family car	4%
Motorhome / campervan	3%
Public bus / coach	3%
Organised coach tour	2%
Motorcycle / motorbike	1%
Hitch-hiking	0%
Bicycle	0%
Train (outside UK)	0%
Other	0%

Those travelling in motorhomes / campervans were most likely of all to mention Scotland's scenery (80%) and a desire to 'get away from it all' as motivations to visit

Q9 How did you travel to Scotland?
Base: S1 All (5947)

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Air travel

Edinburgh was the key arrival airport in Scotland, whilst most connecting flights went via London Heathrow

Edinburgh Airport — *Where Scotland meets the world*: **56%**

GLASGOW AIRPORT — *PROUD TO SERVE SCOTLAND*: **22%**

Aberdeen International Airport: **9%**

Inverness Airport — *Ceangailte · Connected*: **4%**

Prestwick — *Glasgow Prestwick Airport*: **1%**

11% travelled through a connecting airport en route to Scotland

London Gatwick · Reykavik Keflavik · Frankfurt am Maine · Paris Charles de Gaulle · London Heathrow · Newark · Dubai · Amsterdam Schipol · Manchester · Dublin · Toronto · London Stansted · Brussels · Belfast · Stockholm Arlanda

Other Scottish airport 2%
Did not arrive into a Scottish airport 6%

Q9b Which Scottish airport did you arrive in to? Base: S1 All who travelled by plane (2263)
Q9c At which airport(s) did you stop to catch a connecting flight on your way to Scotland?   Base: S1 All who travelled by plane indirect (761)

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Transport used in Scotland

Visitors found it extremely easy to travel within Scotland, using a variety of methods

Transport	%
Own car	50%
Walked	34%
Public bus / coach	28%
Boat / ship / ferry	25%
Train	23%
Hire car	18%
Friend / family car	12%
Organised coach tour	7%
Plane	7%
Bicycle	4%
Motorhome / campervan	4%
Hitch-hiking	1%
Motorcycle / motorbike	1%
Other	2%

BordersRailway
Edinburgh • Midlothian • Scottish Borders

2%

Ease of getting around

1	2	3	4	5	6	7	8	9	10
0%	0%	0%	0%	1%	3%	10%	23%	29%	33%

Mean

8.7
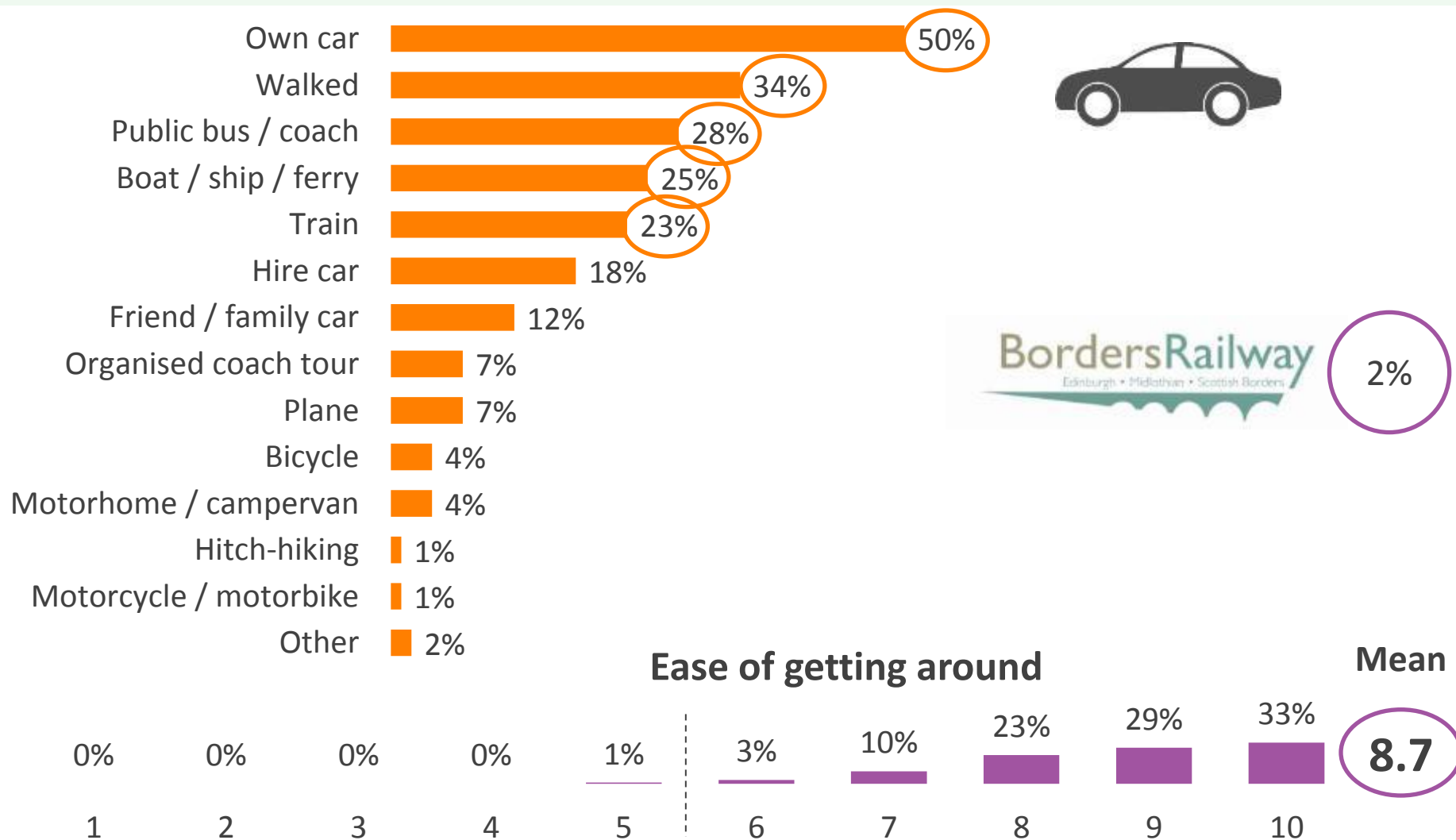
Q26 What types of transport did you use while you were in Scotland?
Q28 Overall, how satisfied were you with the ease of getting around? Base: S2 All (1608)
Q27 Did you use the new Borders railway during your visit to Scotland?
All who visited Edinburgh, Lothians or Scottish Borders from 5th Sept onwards (297); All (1608)

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Areas of Scotland visited on this trip

Edinburgh was the most visited location by two-fifths of all visitors; international visitors visiting twice as many areas as domestic visitors

Area	Areas visited
Edinburgh City	40%
Highlands & Skye	29%
Glasgow City	22%
Stirling, Falkirk & Forth Valley	20%
Wider Glasgow	20%
Loch Lomond & Trossachs National Park	17%
Perth & Perthshire	16%
Aberdeen City & Shire	16%
Ayrshire & Arran	14%
Cairngorms National Park	12%
Fife	12%
Argyll & the Isles	12%
Dumfries & Galloway	10%
Lothians	9%
Scottish Borders	8%
Angus & Dundee	8%
Orkney	7%
Outer Hebrides	5%
Shetland	4%

Average of 2.8 different areas visited

Average by market:
- Rest of World 4.8
- Europe 4.6
- Rest of UK 2.4
- Scottish residents 1.8

Q1 Which areas of Scotland did you visit on this trip?
Base: S2 All (1608)

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Visiting the National Parks

12% visited
Cairngorms National Park

Dalwhinnie, Kingussie, Newtonmore, Aviemore, Carrbridge, Grantown-on-Spey — 58%

Balmoral, Braemar, Ballater, Aberdeenshire area — 40%

Blair Atholl, Killiecrankie, Perthshire area — 35%

17% visited
Loch Lomond & Trossachs National Park

Balloch, Luss, Gartocharn, Balmaha, south Loch Lomond area — 68%

Aberfoyle, Callander, Doune, Strathyre, Killin, Port of Menteith area — 44%

Helensburgh, Tyndrum, Crianlarich — 21%

Q2b Which part(s) of Cairngorms National Park did you visit?
Q2c Which part(s) of Loch Lomond and the Trossachs National Park did you visit?
Base: S2 All who visited NPs (CNP 252 / LLTNP 369)

Areas stayed overnight

Almost a third of visitors stayed overnight in Edinburgh and a fifth in Highlands & Skye

Area	Stayed Overnight
Edinburgh City	31%
Highlands & Skye	22%
Glasgow City	16%
Ayrshire & Arran	12%
Aberdeen City & Shire	12%
Perth & Perthshire	10%
Stirling, Falkirk & Forth Valley	10%
Argyll & the Isles	9%
Wider Glasgow	9%
Loch Lomond & Trossachs National Park	7%
Dumfries & Galloway	7%
Cairngorms National Park	6%
Orkney	6%
Fife	6%
Outer Hebrides	5%
Scottish Borders	5%
Shetland	4%
Angus & Dundee	4%
Lothians	4%

■ Stayed Overnight

Visitors stayed in an average of 1.9 different areas

Average by market:
- Europe 2.9
- Rest of World 2.7
- Rest of UK 1.6
- Scottish residents 1.4

Q3 And which of these areas did you stay overnight in?
Base: S2 All (1608)

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Sources of information for looking for accommodation during trip

A mix of online and offline sources were used for accommodation information during trip for those who didn't book in advance

Source	Percentage
Talking with locals	21%
Google	20%
VIC	15%
Other websites	12%
VisitScotland.com	10%
Printed travel guide books	9%
Online review websites	7%
Information / advice from visitor attraction	4%
Travel guide websites	4%
Personal advice from accommodation provider	3%
Other leaflets from accommodation	3%
Other search engine	3%
Accommodation room pack info	2%
Apps	2%
Social media	2%
None of these	49%

European visitors had the highest usage of several different sources – on and offline. Perhaps linked to lower knowledge of Scotland (60% 1st time visitors)

Q16 During your holiday or short break in Scotland, which of the following sources of information did you use to look for accommodation?

Base: S2 All who didn't book accommodation in advance (212)

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Type of accommodation

Hotels, B&Bs and Guest Houses were the most common types of accommodation used, particularly for international visitors
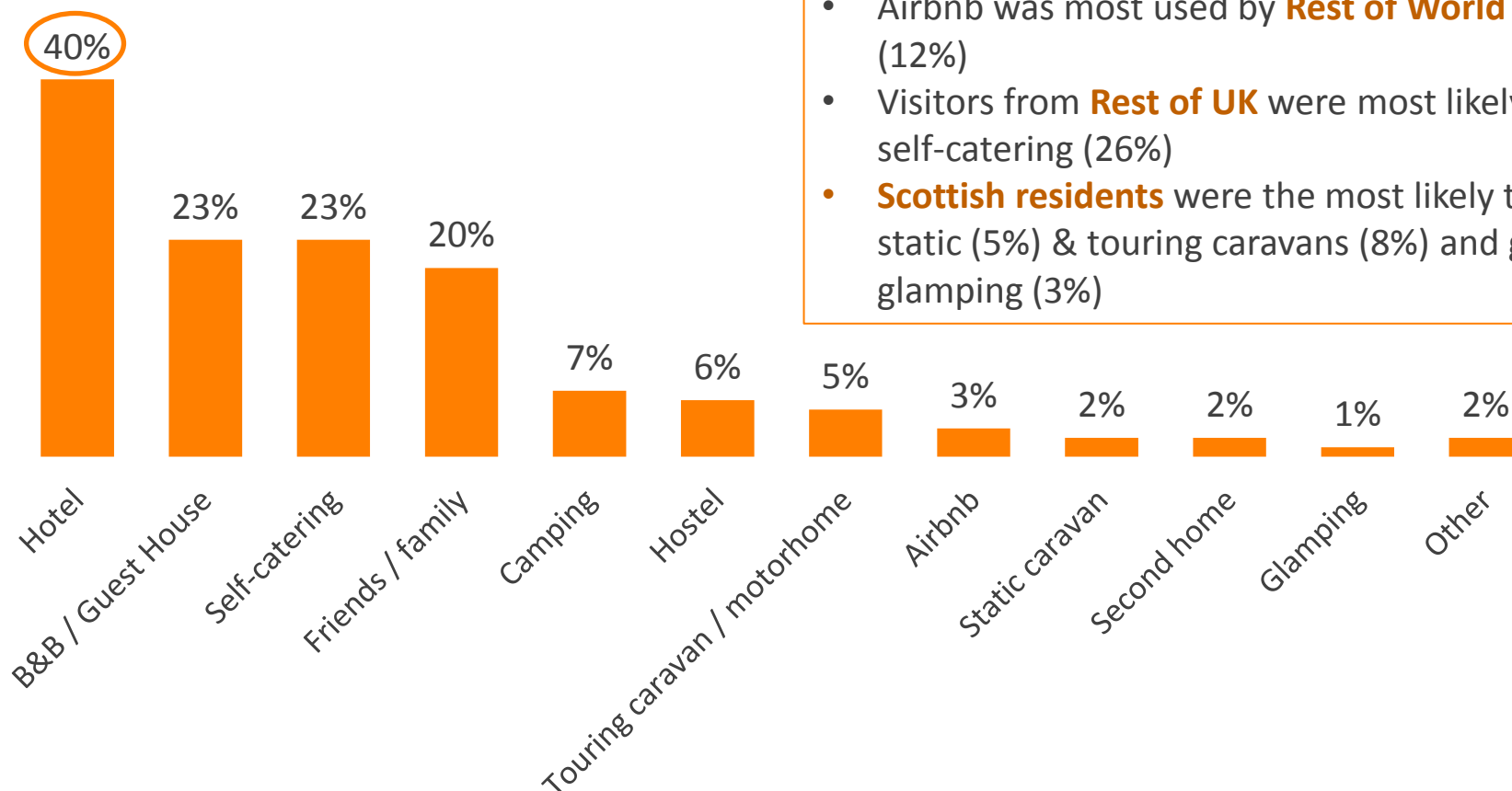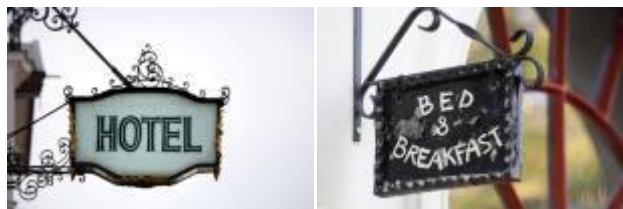
- **European & Rest of World visitors** most likely to stay in hotels (46%, 58%) & B&Bs (38% both) & Hostels (11% 10%)
- Airbnb was most used by **Rest of World** visitors (12%)
- Visitors from **Rest of UK** were most likely to be self-catering (26%)
- **Scottish residents** were the most likely to stay in static (5%) & touring caravans (8%) and go glamping (3%)

Chart: Type of accommodation

- Hotel: 40%
- B&B / Guest House: 23%
- Self-catering: 23%
- Friends / family: 20%
- Camping: 7%
- Hostel: 6%
- Touring caravan / motorhome: 5%
- Airbnb: 3%
- Static caravan: 2%
- Second home: 2%
- Glamping: 1%
- Other: 2%

Q17 What type of accommodation did you stay in during your trip? Base: S2 All (1608)

Accommodation standard

Most visitors stayed in mid-market accommodation

30%
Budget

Budget accommodation most used by younger age groups
49% 16-24s
44% 25-34s

64%
Mid-market

17%
Luxury

Higher proportion of older age groups stayed in luxury accommodation 23% 65+

Visitors staying in luxury accommodation were least likely to be from Europe (10%)

Q21 And how would you describe the accommodation you stayed in?
Base: S2 All who didn't only stay in second home or with friends / family (1448)

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Accommodation grading schemes

Half of visitors were unsure whether their accommodation was part of a grading scheme

Rating	%
★	0%
★★	3%
★★★	39%
★★★★	55%
★★★★★	13%
Don't know	11%

Donut chart: Don't know, 52%; Yes, 34%; No, 14%
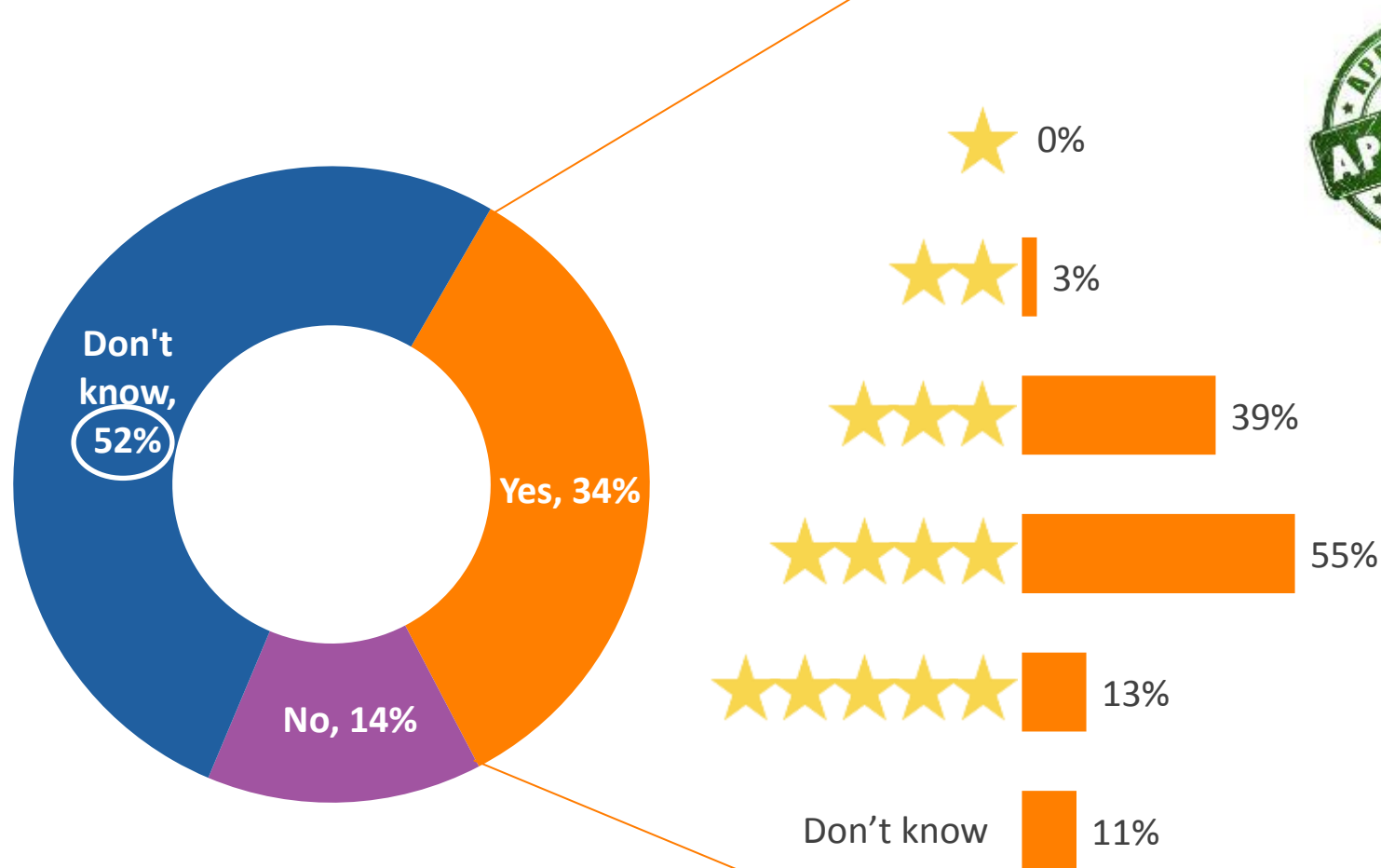
Q22 Was your accommodation or campsite part of a quality / star grading scheme?
Base: S2 All who stayed in hotel, B&B, self-catering, hostel, camping, static caravan, touring caravan (1391); All who stayed in graded accommodation (472)

Accommodation expectations vs experience

Standard of accommodation was praised by most visitors – exceeding expectations for two-fifths

41%
Said the standard of accommodation **exceeded** their expectations

54%
Expectations were met

5% BELOW

52% were staying in budget accommodation; mostly hotels

- Reasons expectations not met:
  - Lack of cleanliness
  - Accommodation below standard expected for price
  - Standard of food was poor
  - Facilities needed upgrading

Accommodation ratings (1)

Service levels and knowledge of accommodation staff highly praised

Service provided by staff

Mean

N/A	1	2	3	4	5	6	7	8	9	10
11%	1%	1%	0%	2%	4%	5%	11%	17%	18%	30%

8.3

Visitors from Rest of World and Scotland are most likely to praise the service provided (8.7 and 8.5)
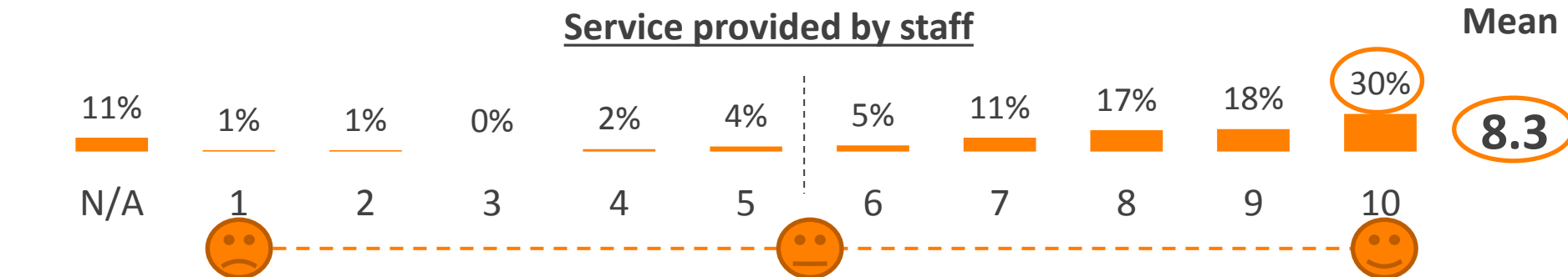
Knowledge of staff about things to do in local area

N/A	1	2	3	4	5	6	7	8	9	10
25%	1%	0%	1%	1%	4%	5%	9%	14%	15%	25%

8.3

Visitors from Rest of World particularly praise staff knowledge (8.7)
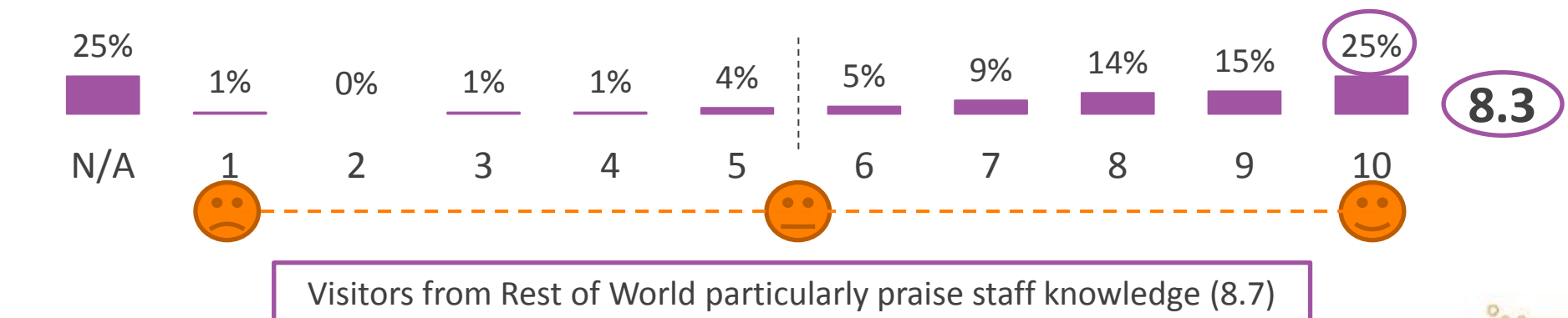
Q25 Thinking about the accommodation you stayed in in Scotland as a whole and the regions you stayed in; overall how satisfied were you with:
Base: S2 All who didn't only stay in second home or with friends / family (1448)

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Accommodation ratings (2)

Value for money - accommodation

Mean

N/A	1	2	3	4	5	6	7	8	9	10
2%	1%	1%	1%	2%	5%	7%	17%	22%	15%	26%

7.9
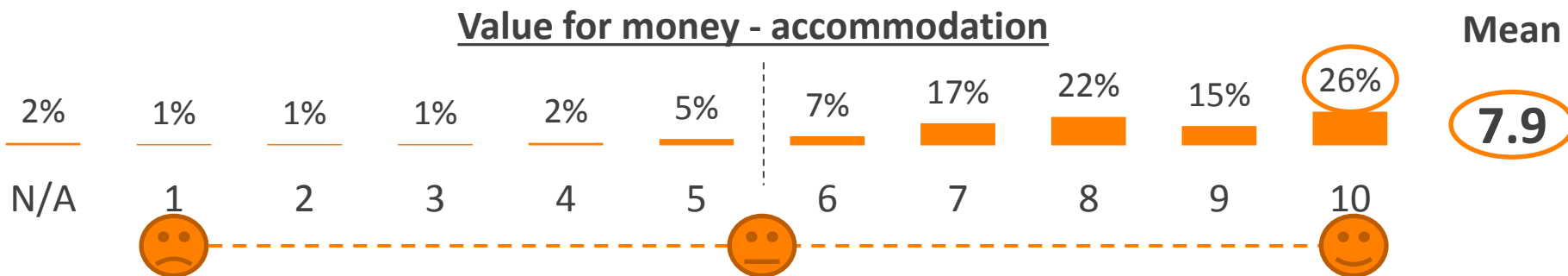
Visitors from Rest of World and Scotland are most likely to consider their accommodation good value (8.3 and 8.2)

Availability of free WiFi

N/A	1	2	3	4	5	6	7	8	9	10
12%	4%	3%	2%	3%	7%	8%	9%	12%	13%	27%

7.5
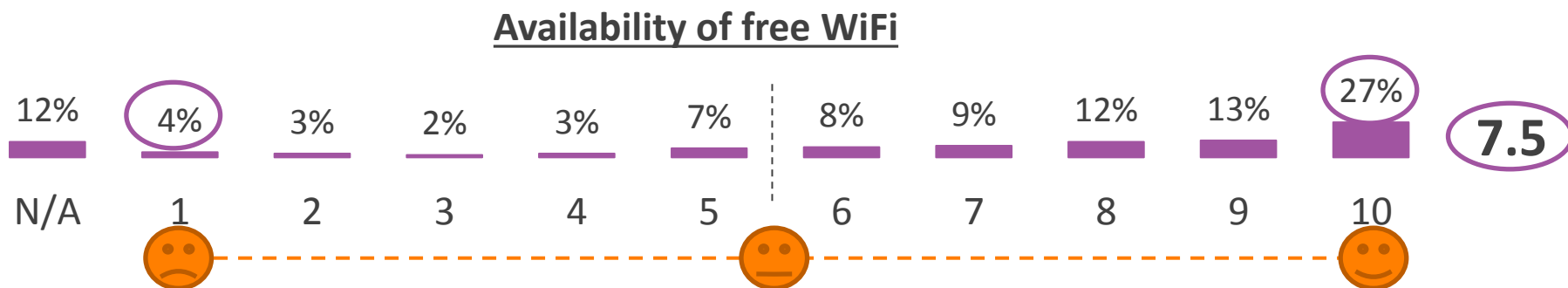
Visitors from Rest of World give highest ratings here (8.2) whilst Scots give lowest (7.2)

Posting reviews

A fifth posted reviews of their accommodation, mostly on tripadvisor; a much lower proportion than use review sites for planning their trip. Opportunity to encourage reviews where expectations exceeded

13% tripadvisor

6% → Booking.com   airbnb

No, 81%

Those with experiences at either end of the satisfaction scale were most likely to post reviews:
22% whose expectations were *exceeded*
24% of those whose experience was *below expectations*
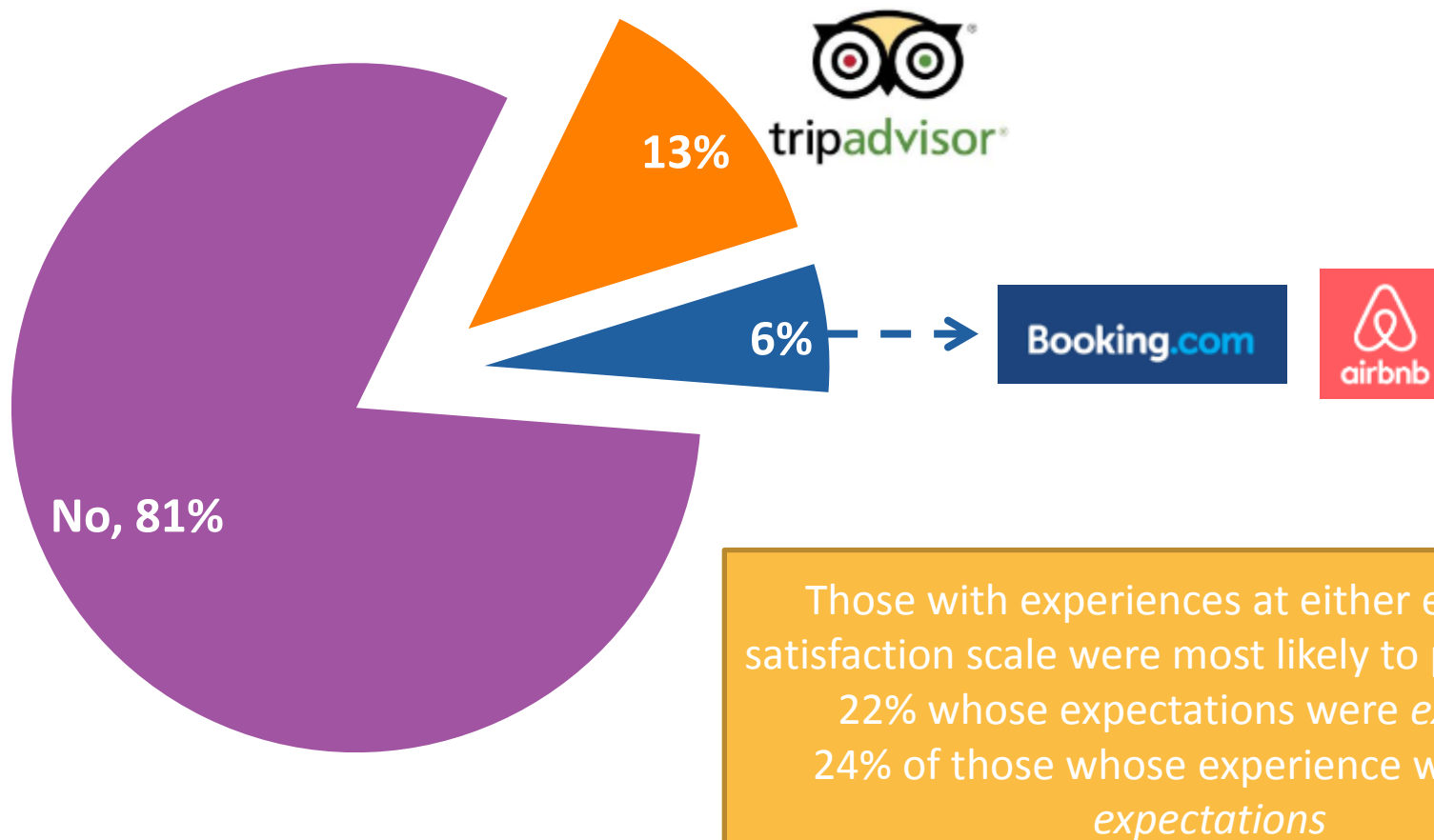
Q24 Did you leave any reviews about the accommodation you stayed in in Scotland on TripAdvisor or another review site?
Base: S2 All who didn't only stay in second home or with friends / family (1448);

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Information sources for things to see and do

Offline sources dominated in finding out about things to see and do during break highlighting importance of local people in delivery of information, alongside digital and printed materials

Source	%
Talking with locals	49%
VIC	34%
Personal advice from accommodation provider	33%
Other leaflets from accommodation	31%
Google	31%
VisitScotland.com	29%
Accommodation room pack info	28%
Information / advice from visitor attraction	22%
Printed travel guide books	18%
Other websites	18%
Travel guide websites	11%
Online review websites	9%
Social media	8%
Apps	4%
Other search engine	2%
None of these	9%

- Visitors from the **Rest of the World** used most information sources, particularly talking to locals (67%), accommodation provider (52%) and google (49%).
- **European visitors** talk to locals (67%) and use travel guides (49%)

Only 1 in 10 are **not** looking for info on things to see & do

Q29 During your holiday or short break in Scotland, which of the following sources of information did you use to look for things to see and do?   Base: S2 All (1608)

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Activities undertaken

Visitors engaged in a wide range of activities during their trip

Activity	Percentage
Dined out in restaurant / café / pub	93%
Sightseeing	74%
Historic house / stately home / castle	57%
Tried local food	56%
Short walk / stroll	55%
Tried local drinks	47%
Shopping	44%
Museum / art gallery	44%
Centre based walking	43%
Cathedral / church / abbey	43%
Country park / garden	42%
Beach	39%
Long walk / hike / ramble	39%
Cities	39%
Visitor / heritage centre	37%
Night out / visited pubs	36%
Woodland / forest	32%
Had a picnic / BBQ	30%
Wildlife / bird watching	25%
Visited a whisky distillery	20%

Q30 Which, if any, of the following activities did you take part in during your trip to Scotland?
Base: S2 All (1608)

Top 5 activities by market

Scottish Residents

- Dined out
  91%
- Sightseeing
  74%
- Short Walks
  59%
- Beach
  48%
- Shopping
  44%

Rest of UK

- Dined out
  92%
- Sightseeing
  69%
- Historic House / Castle
  55%
- Short Walks
  52%
- Museum / Art Gallery
  42%

Europeans

- Dined out
  92%
- Sightseeing
  80%
- Historic House / Castle
  74%
- Tried Local Food
  73%
- Cities
  73%

Rest of World

- Dined out
  97%
- Sightseeing
  90%
- Historic House / Castle
  86%
- Cathedral / Church / Abbey
  80%
- Tried Local Food
  80%

Base: S2 All visitors from Scotland(273); Rest of UK (465); Europe (373); Rest of World (359)

Interest in finding out about Gaelic

A third of visitors stated an interest in or enjoyment of finding out about Gaelic, particularly international visitors
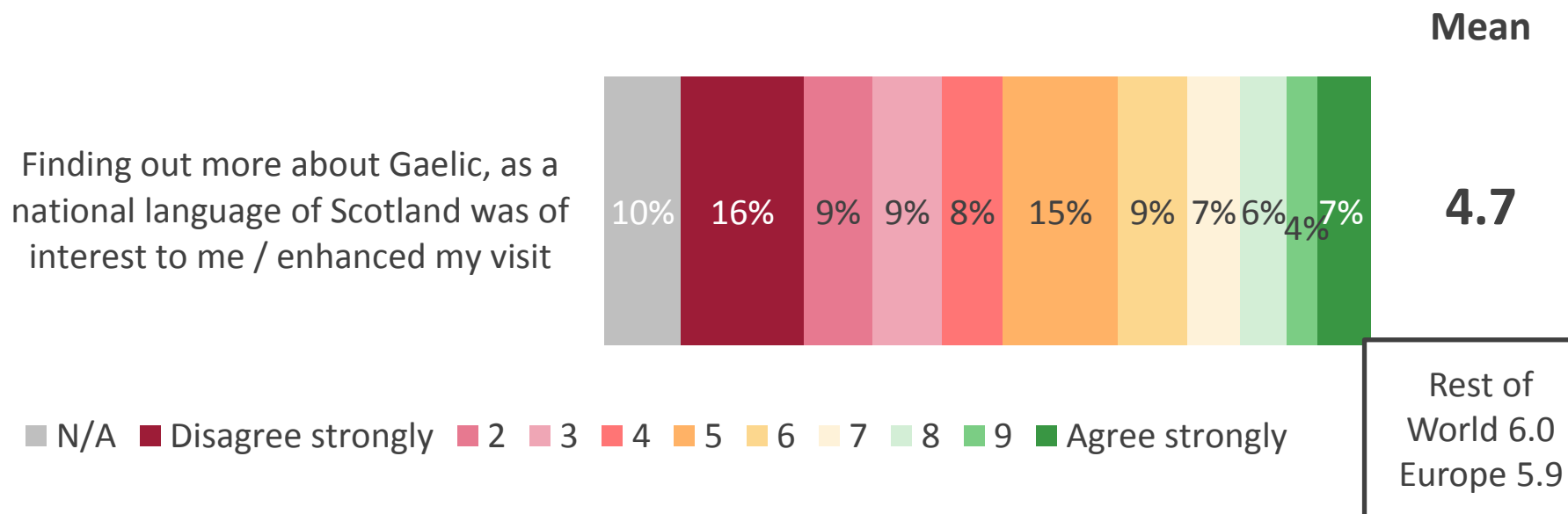
Mean

Finding out more about Gaelic, as a national language of Scotland was of interest to me / enhanced my visit

| 10% | 16% | 9% | 9% | 8% | 15% | 9% | 7% | 6% | 4% | 7% |

4.7

■ N/A ■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

Rest of World 6.0
Europe 5.9

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements?

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Activity ratings

Activities generally exceeded visitor expectations and were considered good value

Mean

There was enough to do in all weather conditions

| 8% | 11% | 20% | 19% | 13% | 24% |

7.8

There was enough to do in the evenings

| 6% | 6% | 16% | 21% | 16% | 28% |

8.2

■ N/A ■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

59% of visitors said the quality of activities exceeded their expectations; and **40%** said expectations were met

Value for money - activities

1	2	3	4	5	6	7	8	9	10
0%	0%	1%	1%	3%	6%	17%	24%	21%	28%

Mean

8.3

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Food and drink

Trying local food and drink is an integral part of the visitor experience, particularly for international visitors, who show a strong desire to find out about local foods

Mean

When on holiday I really like to find out about the local foods & local dishes unique to the destination

| 8% | 8% | 15% | 22% | 17% | 26% |

7.9

■ Disagree strongly   ■ 2   ■ 3   ■ 4   ■ 5   ■ 6   ■ 7   ■ 8   ■ 9   ■ Agree strongly
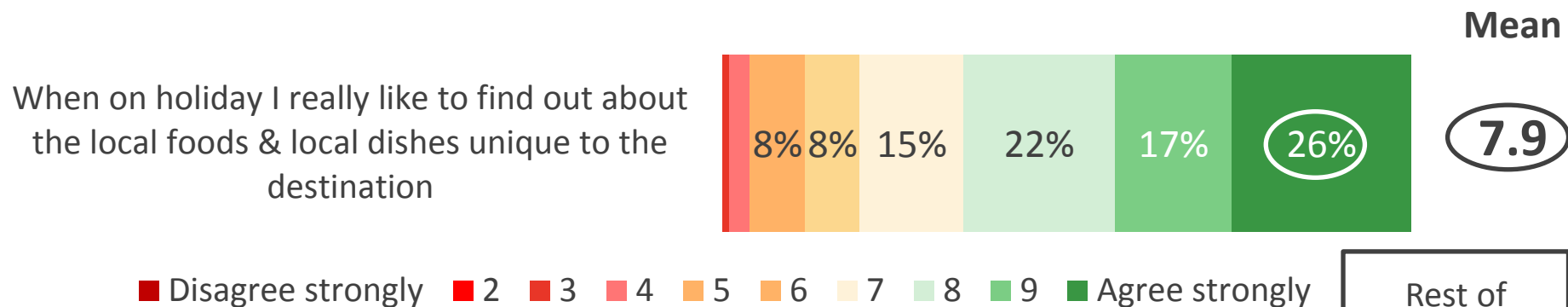
Rest of World 8.4
Europe 8.2

9% said the reputation of the restaurant / quality of food was a factor in choosing their accommodation

Quality of food - expectations vs experience

A gap exists, especially for international visitors between expectations and experience of Scottish food

	Expectations	Experience
Extremely good	17%	(23%)
9	10%	17%
8	23%	27%
7	16%	14%
6	8%	7%
5	(21%)	9%
4	3%	2%
3	1%	1%
2	1%	0%
Extremely poor	0%	0%

■ Expectations
■ Experience
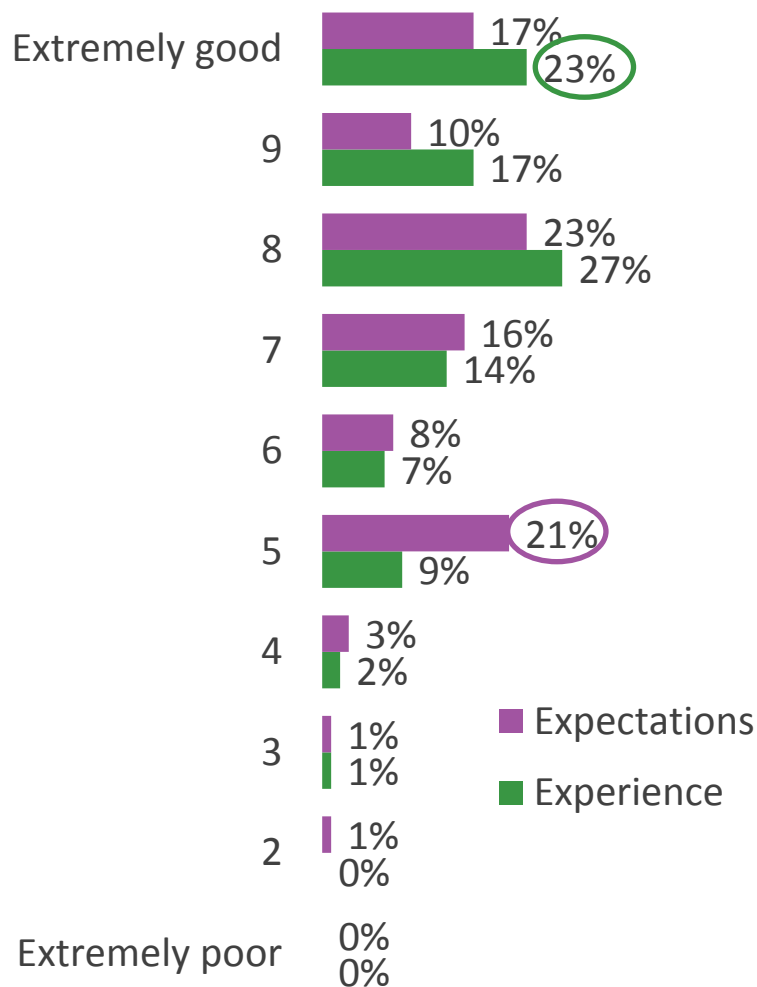
Mean Score
Expectation 7.3
Experience 7.9

	Scots	Rest of UK	Europeans	Rest of World
Expectation	7.86	7.4	6.09	6.55
Experience	8.36	7.89	7.29	8.09

◆ Expectation ■ Experience
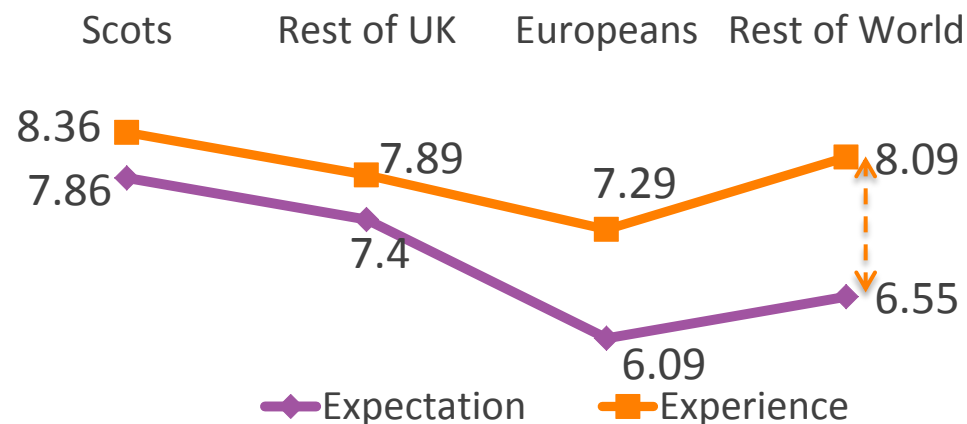
Q34 Now thinking about the quality of food in Scotland, please complete the following statements:
a) Before my trip I expected the food in Scotland to be…
b) During my trip the food I experienced was generally….
Base: S2 All (1608)

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Food & drink experiences

Around half of all visitors tried local food & drink during their trip, higher amongst international visitors

Experience	Percentage
Dined out in restaurant / café / pub	93%
Tried local food	56%
Tried local drinks	47%
Night out / visited pubs	36%
Had a picnic / BBQ	30%
Visited a whisky distillery	20%
Attended food & drink event	4%
Went on food or drink trail	1%
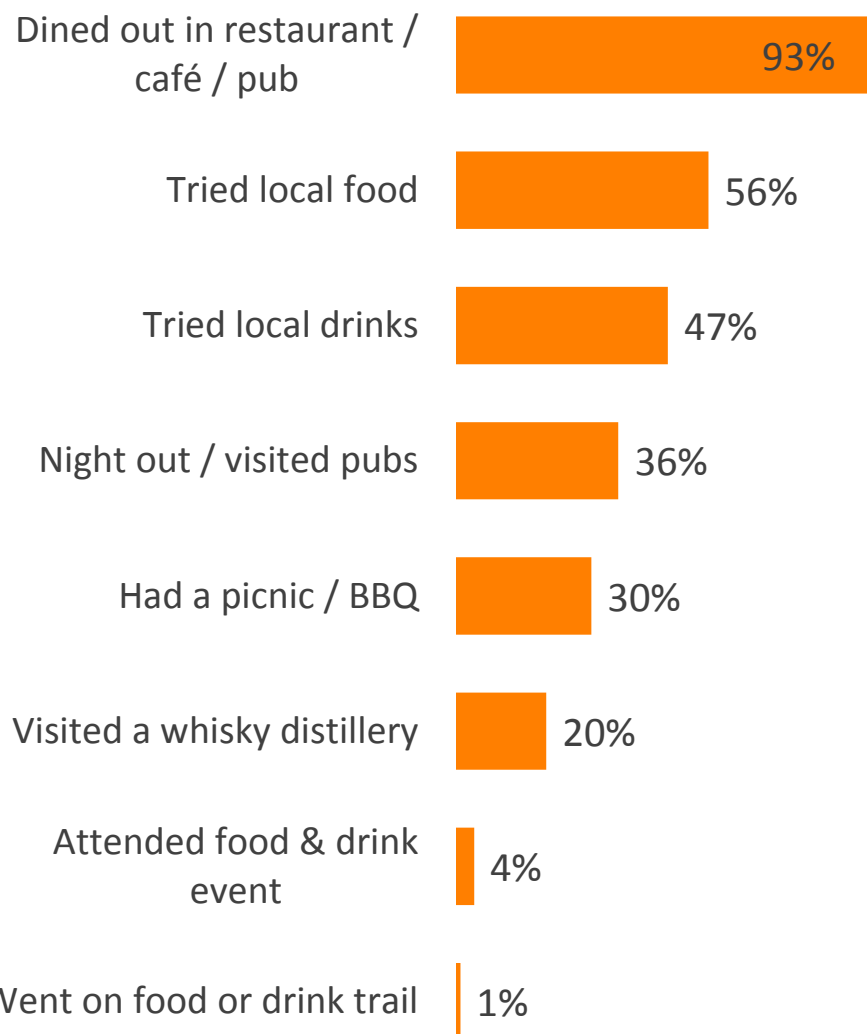
- Visitors from the Rest of the World were most likely to try local food (80%), local drinks (73%), have a night out (56%) and a third visited a distillery
- European visitors were also more likely to try local food (73%), local drinks (67%), have a night out (43%) and visit a distillery (40%)

Q35 Which of the following did you experience during your holiday / short break in Scotland?
Base: S2 All (1608)

Information sources used to help choose places to eat out

Three-quarters of visitors sought information about eating out whilst in Scotland, mostly from local people

Source	%
Talking with locals	43%
Personal advice from accommodation provider	27%
Google	18%
Accommodation room pack info	13%
VIC	8%
Printed travel guide books	8%
Other leaflets from accommodation	8%
Online review websites	8%
Other websites	8%
VisitScotland.com	6%
Information / advice from visitor attraction	5%
Travel guide websites	5%
Social media	4%
Looked for quality star grading	3%
Apps	3%
Other search engine	1%
None of these	25%

VICs and vs.com used much less for information on eating out than for things to see and do (34%)

- Talking with locals (70%) and personal advice from accommodation (45%) were particularly important sources for Rest of World visitors
- Printed guide books were most consulted by visitors from Europe 26%

Q36 During your holiday or short break in Scotland, which of the following sources of information did you use to help choose places to eat out?
Base: S2 All who dined out (1504)

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Reviews relating to places ate out

1 in 10 visitors posted reviews about places they dined in Scotland, half the number who posted reviews on accommodation. Almost all eating out reviews were posted on tripadvisor

Eating out

9%

tripadvisor

Other review site, 1%

No, 90%
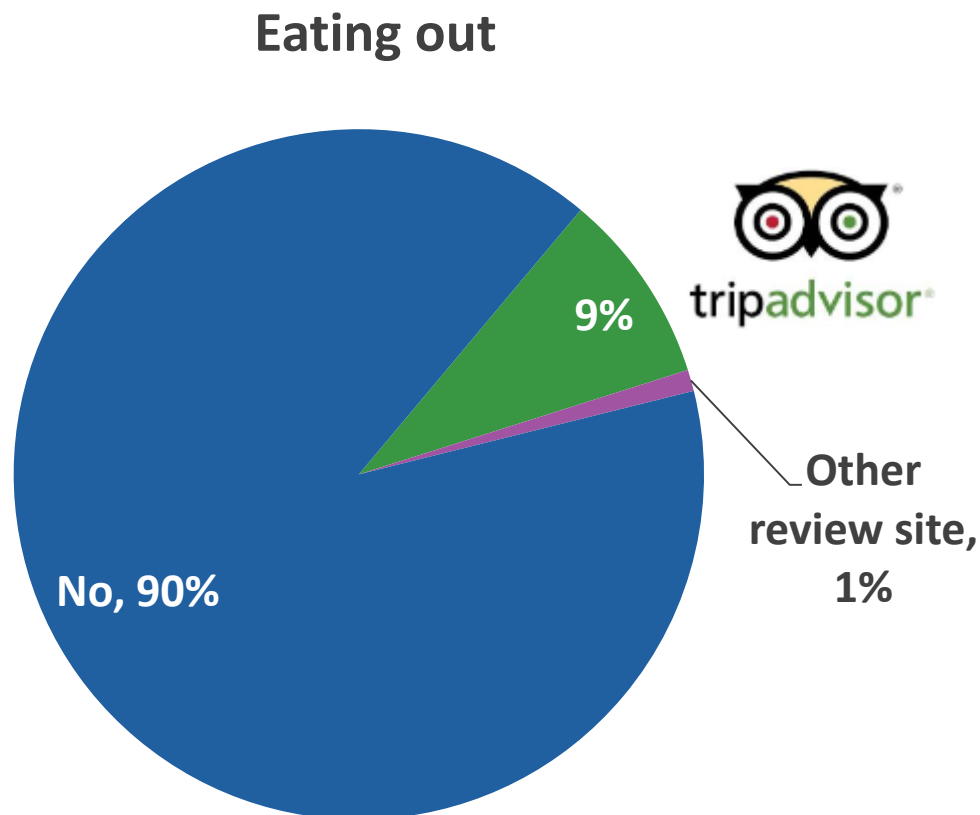
Reviews much less common here compared with 19% posting reviews on accommodation; and 44% using review sites for holiday planning.

Food & drink ratings

Local produce was generally available when eating out. Value for money of eating out was considered lower than for activities or accommodation.

Availability of local produce

Mean

1	2	3	4	5	6	7	8	9	10
0%	0%	1%	3%	9%	11%	19%	23%	16%	18%

7.7

Scots
8.1

Value for money - eating out

1	2	3	4	5	6	7	8	9	10
0%	1%	1%	3%	8%	12%	23%	24%	14%	14%

7.5

Scots 7.8
Rest of UK 7.6

Value for money of eating out rated lower than for accommodation or activities; especially by international visitors
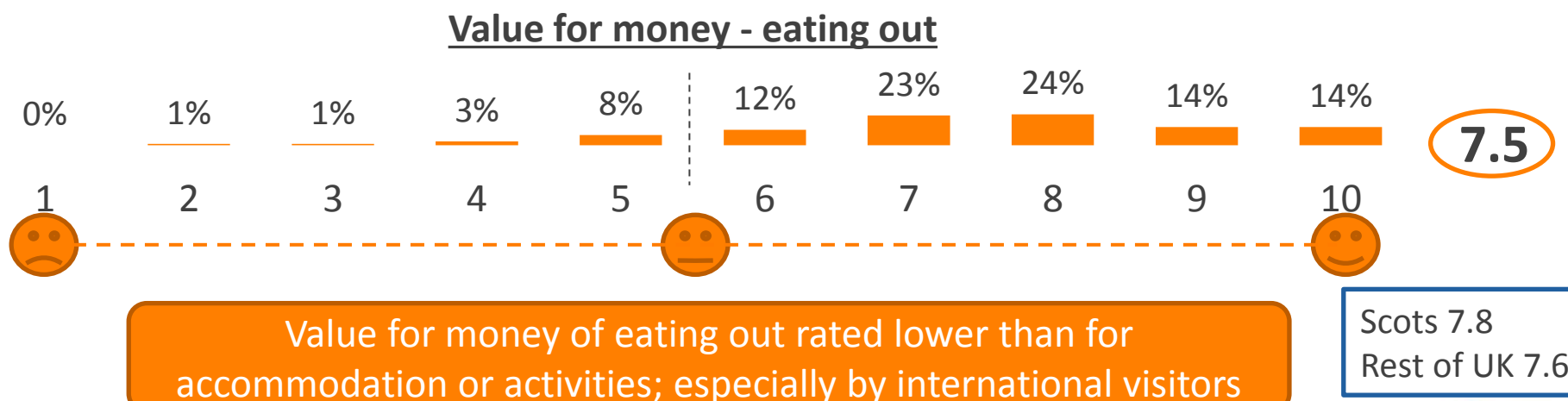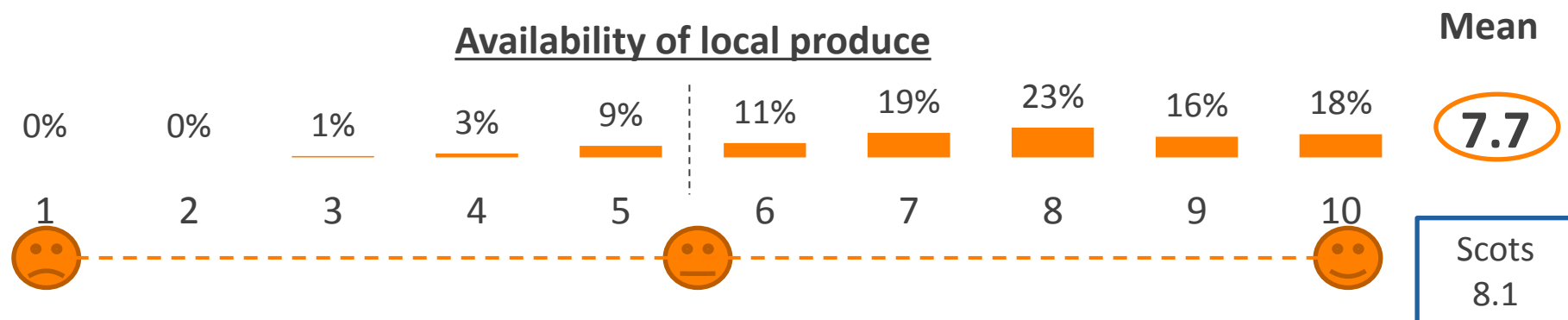
Q38 Overall how satisfied were you with the following aspects of eating out during your holiday / short break in Scotland. 1=extremely dissatisfied, 10 = extremely satisfied
Base: S2 All who dined out (1504)

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The importance of connectivity

Views on remaining connected to the outside world were polarised

Mean

I want to be in constant touch with family, friends & current affairs whilst I'm on holiday

| 8% | 6% | 12% | 9% | 19% | 10% | 11% | 11% | 5% | 9% |

5.5

■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

Most important for visitors from the Rest of World **5.9** and visitors aged 65+ **5.9**
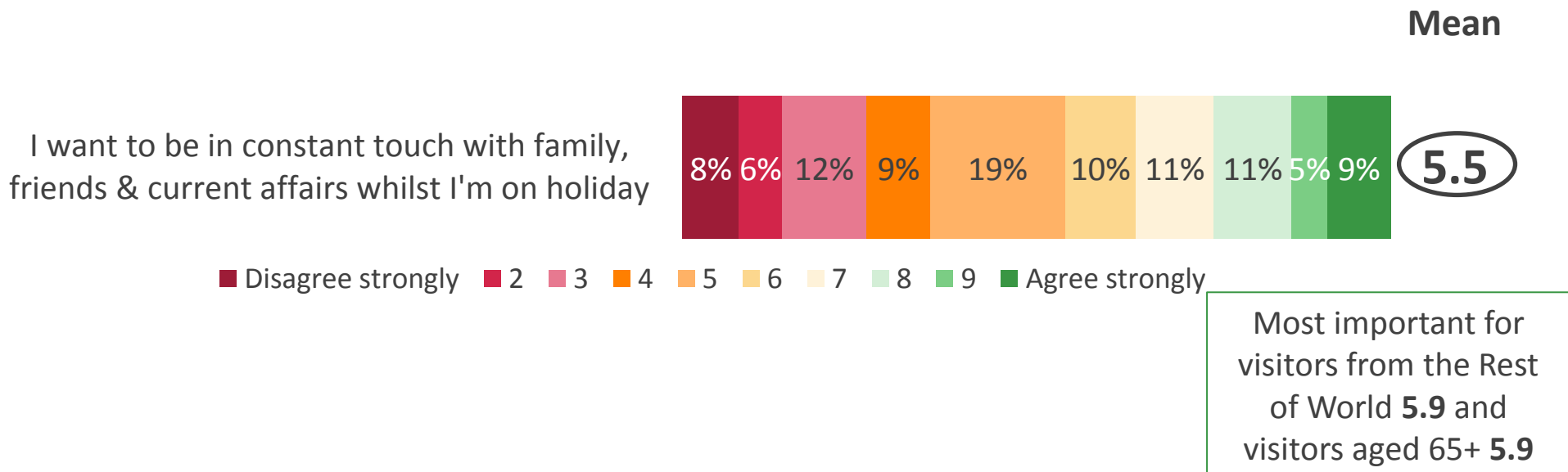
But this doesn't mean technological connectivity is not important…

Usage of devices to find information during trip

High usage of smartphones and tablets to find out info whilst in Scotland, but face to face interaction still important

Used to find out information

- Smartphone **65%**
- Talking face-to-face **53%**
- Tablet **36%**
- Laptop/desktop **19%**
- Telephone **14%**
- None of these **10%**

Type of information sought

Weather reports **83%**	**Maps / travel directions** **75%**
Things to see & do in local area **61%**	**Places to eat / drink in local area** **54%**
What's on in local area **47%**	**Transport** **27%**
Accommodation **12%**	**Something else** **1%**
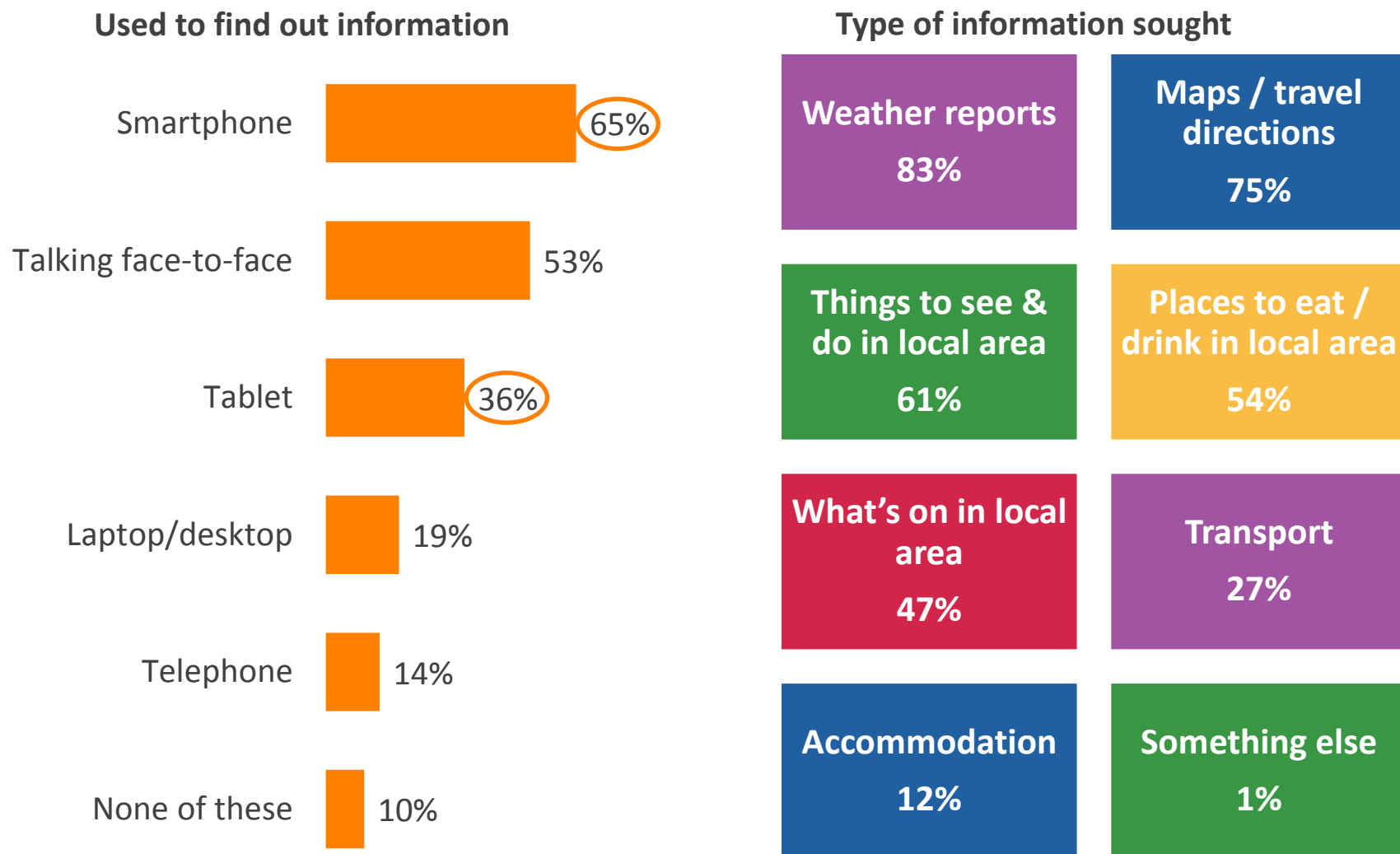
Q39 During your holiday or short break in Scotland, did you use any of the following to find out information relating to your trip <u>while you were in Scotland</u>? Base: S2 All (1608);

Q40 What type(s) of information did you look for during your trip? Base: S2 All who looked for information (1475)

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Connectivity ratings

Satisfaction with connectivity is lower than other aspects of trip, particularly amongst Scottish residents

Mean

Mobile signal:
N/A	1	2	3	4	5	6	7	8	9	10
7%	4%	3%	6%	5%	8%	9%	14%	16%	12%	14%

Mean: **6.7**

Free WiFi:
N/A	1	2	3	4	5	6	7	8	9	10
11%	4%	4%	5%	6%	12%	10%	12%	13%	10%	14%

Mean: **6.6**

3G/4G:
N/A	1	2	3	4	5	6	7	8	9	10
23%	6%	4%	6%	6%	9%	8%	10%	13%	7%	9%

Mean: **6.1**
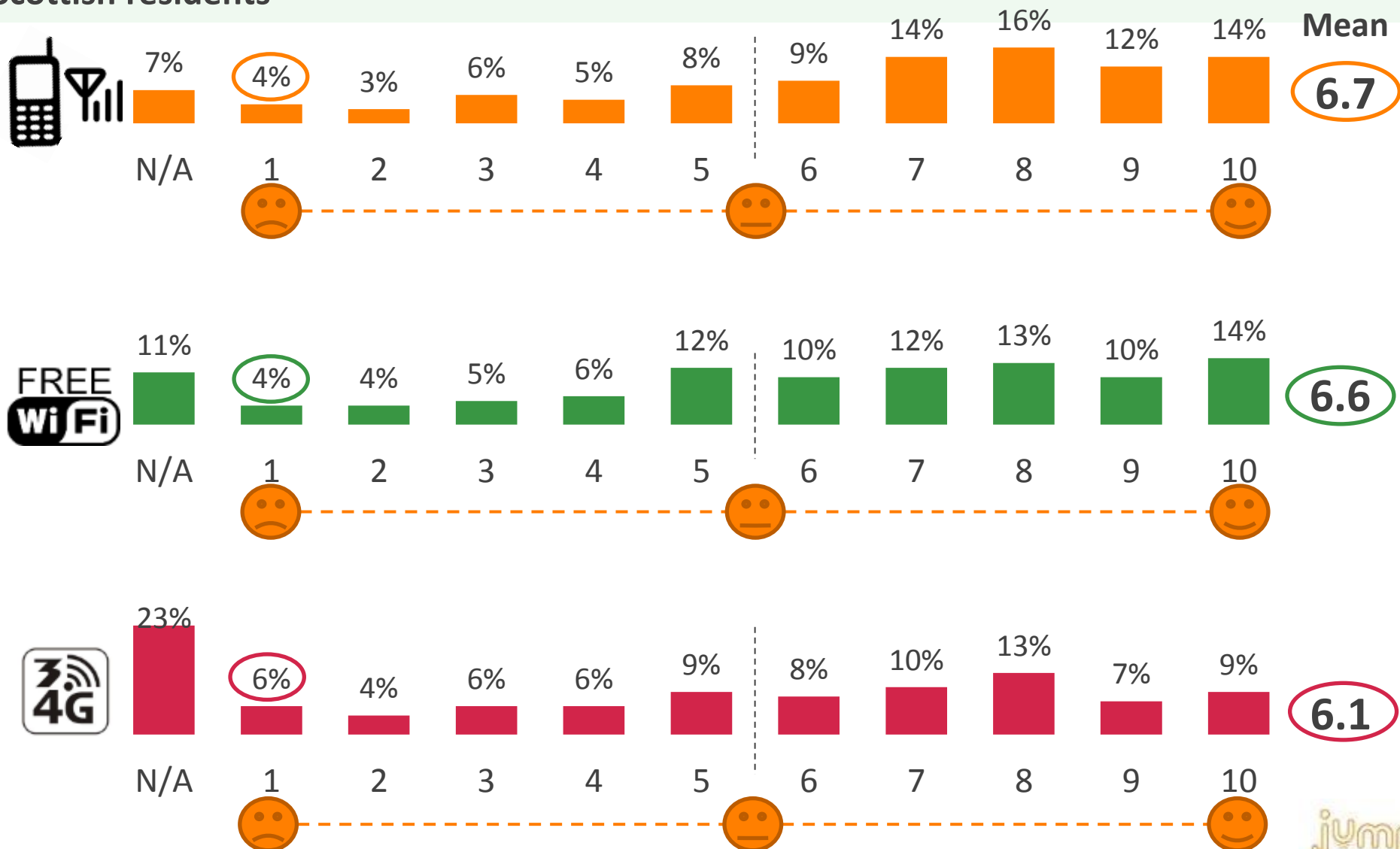
Q41 How satisfied were you with the following whilst in Scotland
Base: S2 All (1608)

Accessibility ratings

Satisfaction levels are high with accessibility provisions at accommodation & attractions for those with access needs

Accessibility needs

No, 92%

Prefer not to say, 2%

Yes, 6%

Satisfaction with accessibility

	Attractions	Accommodation
Extremely satisfied	28%	33%
9	21%	12%
8	19%	11%
7	19%	9%
6	5%	9%
5	1%	3%
4	1%	1%
3	2%	1%
2	0%	1%
Extremely dissatisfied	0%	0%
N/A	2%	20%

■ Attractions   ■ Accommodation
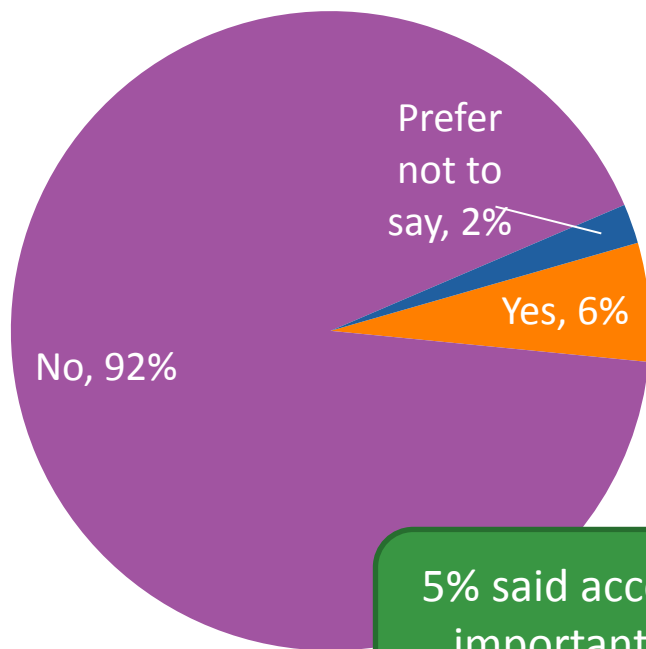
Mean   8.3   8.4

> 5% said accessibility provisions were an important consideration in choosing their accommodation
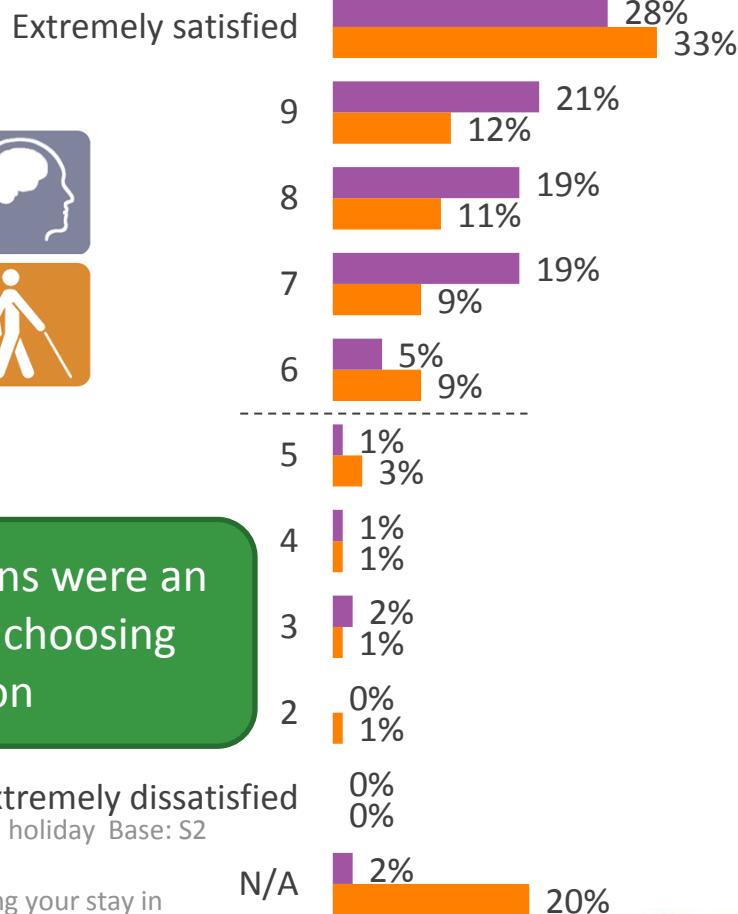
Q44 Do you have particular accessibility needs to take into consideration when travelling / on holiday Base: S2 All (1608);
Q44b How satisfied were you with the accessibility of the accommodation you stayed in during your stay in Scotland? Base: S2 All who didn't only stay in second home or with friends / family (1448);
Q44c And how satisfied were you with the accessibility of attractions you visited during your stay in Scotland? Base: All with accessibility needs (76)

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During Trip – Key Takeouts

Takeouts

- Travel to Scotland is mainly by air (international visitors) or car (domestic visitors)
  - and once here, the ease of getting around Scotland is highly praised
- On average visitors stay overnight in two regions with an average stay of just over 7 nights
  - International visitors visit more areas and stay longer
- Mid-market serviced accommodation dominates, but interestingly a significant proportion were unsure whether their accommodation was part of a grading scheme

Implications

- Promote ease of travel to and transport around Scotland to all visitors
  - Encourage frequent repeat visits for domestic markets
  - Encourage longer stays and wider travel within Scotland for international markets
- Ensure sufficient options exist for quality serviced accommodation
- Question to be answered around continuing importance of grading schemes in context of wide usage of review sites

During Trip – Key Takeouts

Takeouts

- Activities undertaken are fairly consistent by market – exception is Scots who are less focused on culture & heritage aspects

- Food & drink is an important part of the visitor experience
  - International visitors seek authentic local food / drink experiences
  - Value for money scores are lower for eating out than other aspects

- Visitor experience exceeds expectations for accommodation, activities and food & drink

Implications

- Ability to communicate consistent message around core activities favoured by all as well as tailor by market

- Emphasis for food & drink industry on providing local produce and authentic experiences at reasonable value

- Again, encouraging visitor advocacy around areas where expectations exceeded may help influence potential visitors unsure of what to expect

During Trip – Key Takeouts

Takeouts

- Digital connectivity is the aspect visitors are least satisfied with
- High proportion are using smartphones during their trip to source a variety of types of information
- Availability of WiFi in accommodation is important for many

Implications

- Increasing expectation that mobile coverage should be good
- Reliance on smartphones for weather, maps and other information means 3G/4G and WiFi availability is expected
- Improvements required in this area to satisfy visitor expectations

Blair Castle, Perthshire

Overall rating of holiday experience

Visitors were extremely positive about their experience in Scotland with 45% scoring 10/10

Overall rating of holiday experience

1	2	3	4	5	6	7	8	9	10
0%	0%	0%	0%	1%	1%	7%	21%	25%	**45%**

Mean Score (/10) — **9.0**
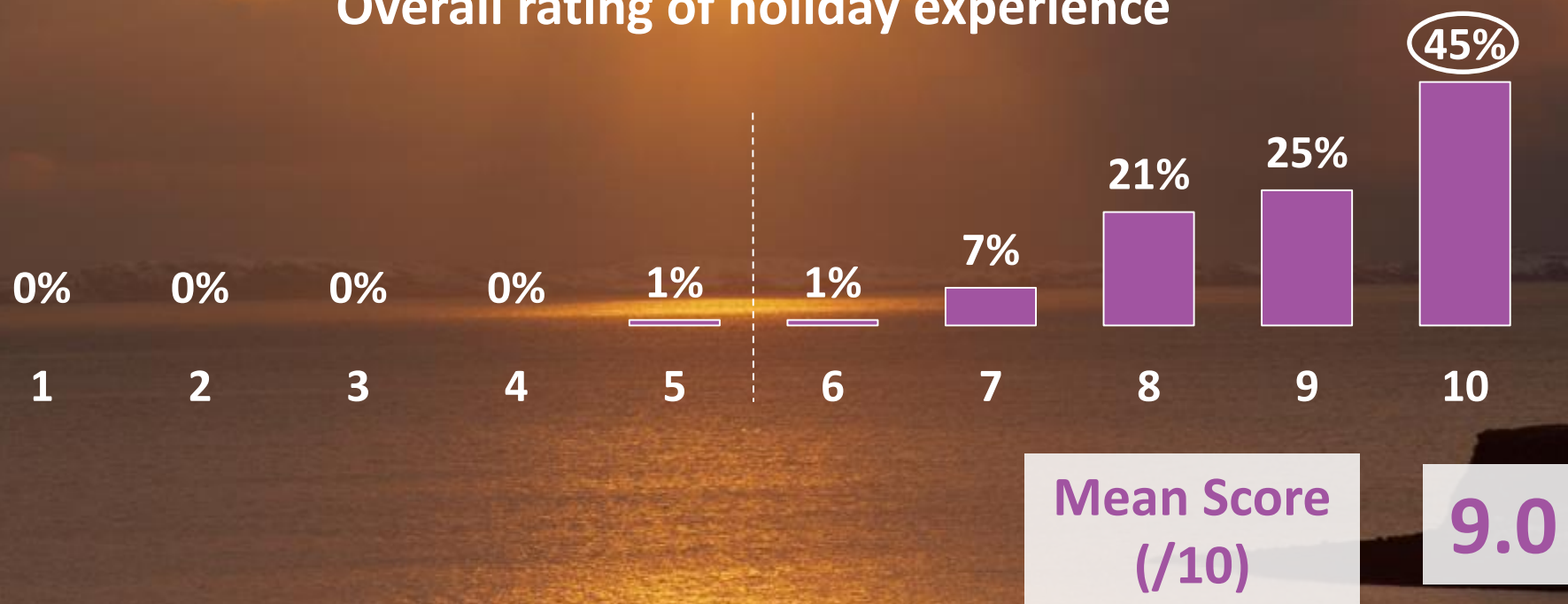
Note: post holiday reflection usually brings halo effect resulting in positive overall scores. New 1-10 scale helps understand more detail.

Q49 Overall, how would you rate your holiday / short break experience in Scotland?
Base: S2 All (1608)

Likelihood to recommend Scotland

Visitors are clearly motivated to recommend Scotland as a holiday destination, with 56% stating the strongest intent (10/10).

Likelihood to recommend Scotland

1	2	3	4	5	6	7	8	9	10
0%	0%	0%	0%	0%	2%	4%	18%	19%	56%
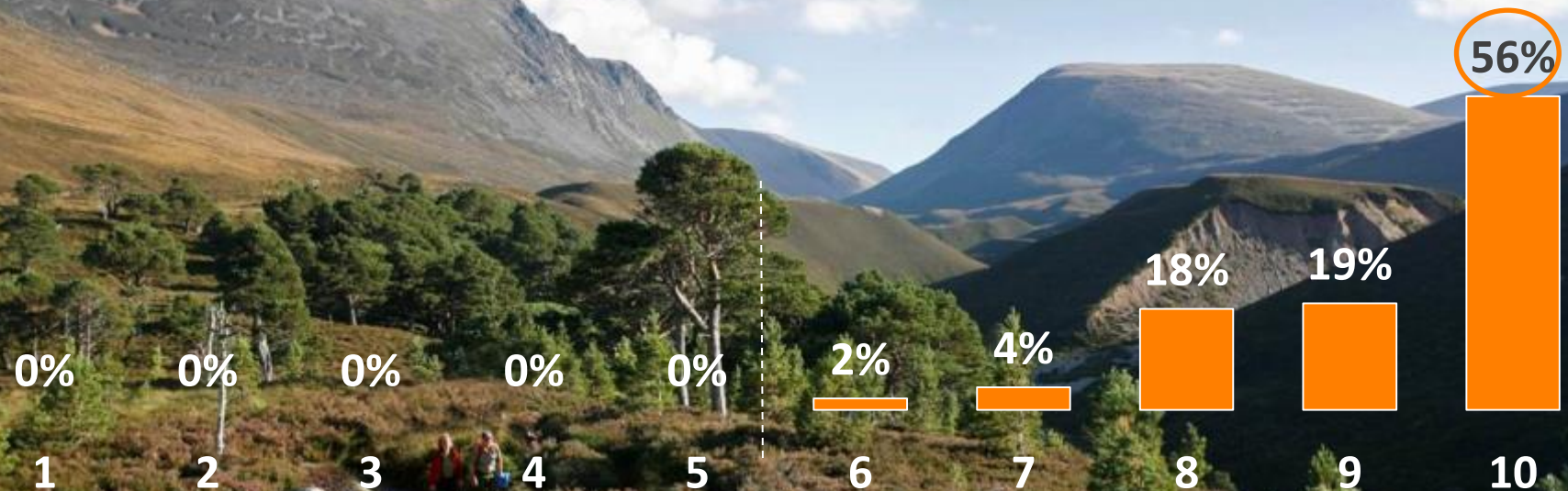
Mean Score (/10) **9.2**

Satisfaction & recommendation by market

High levels of satisfaction and recommendation were recorded amongst all visitor types, particularly those who travelled from furthest afield

Mean Scores

Satisfaction

All	9
Rest of world	9.3
Europe	8.9
Rest of UK	9
Scotland	9

Recommend

All	9.2
Rest of world	9.4
Europe	9.1
Rest of UK	9.2
Scotland	9.2
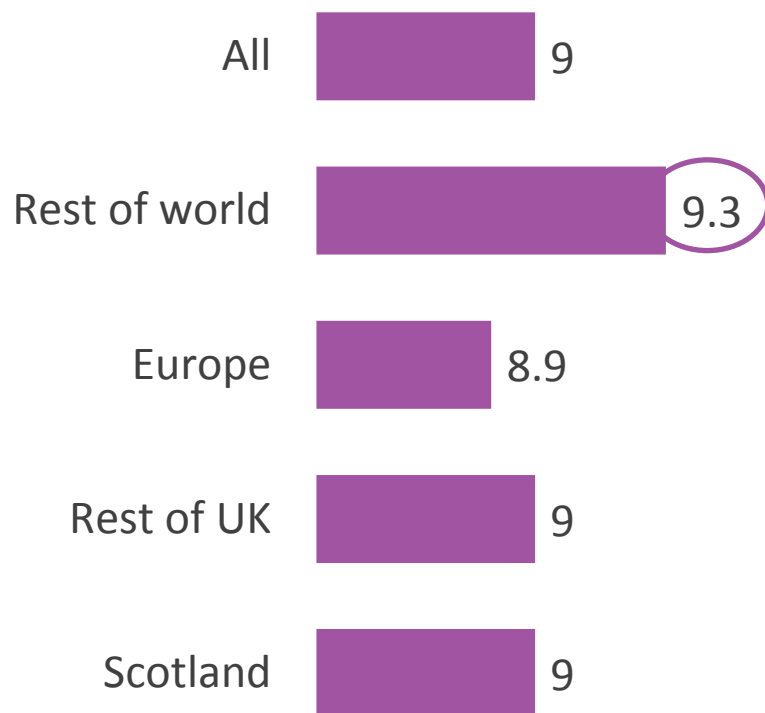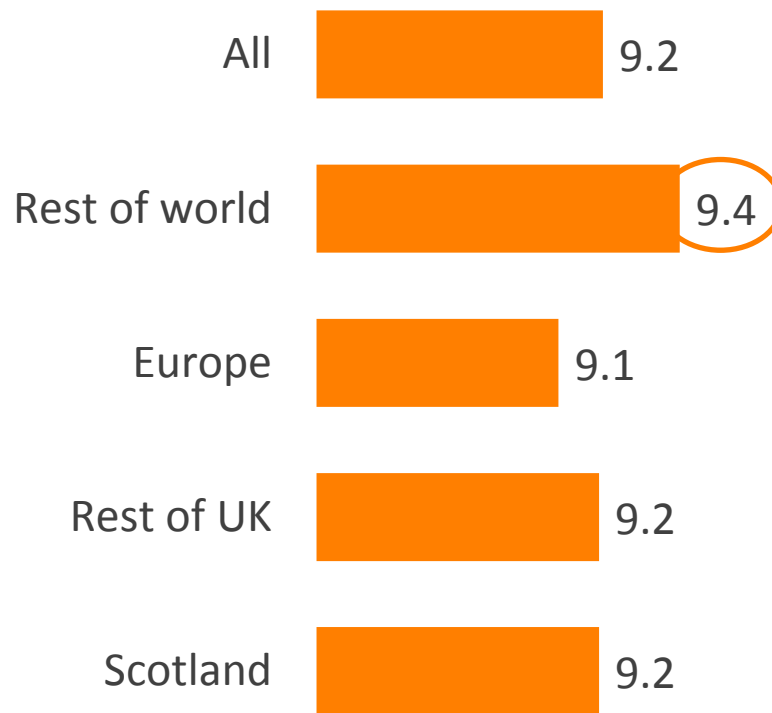
Q49 Overall, how would you rate your holiday / short break experience in Scotland?
Q46 Based on your experiences during this trip, how likely are you to recommend Scotland as a holiday or short break destination to friends and family?
Base: S2 All (1608)

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Overall experience ratings

Visitors firmly endorsed Scotland for repeat visits. Half felt it was one of the best breaks they had ever taken

Mean

Scotland is a country worth visiting more than once
6% | 13% | 18% | (60%)
9.2
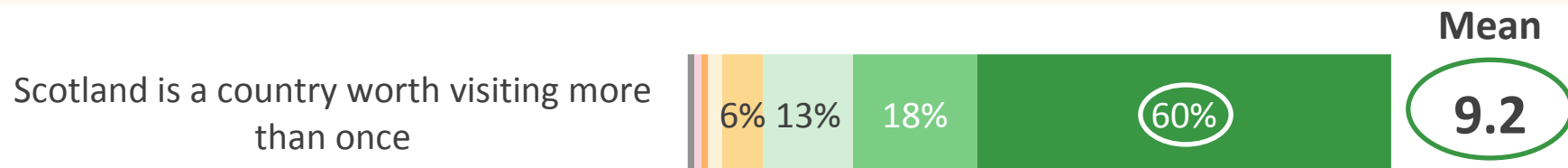
Scotland is a country which takes care of its natural environment
5% 7% | 15% | 25% | 17% | 27%
8.2
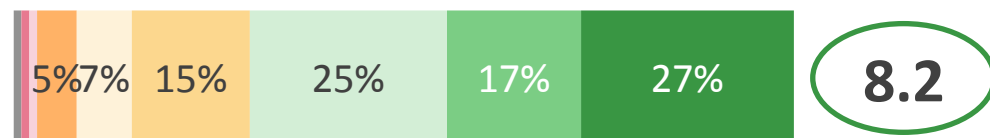
There is more to Scotland than I had previously thought
8% | 12% | 9% | 14% | 19% | 11% | 21%
7.5
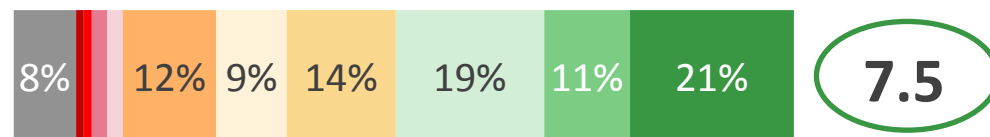
This was one of the best holidays / short breaks I have ever taken
11% | 12% | 20% | 20% | 11% | 18%
7.4
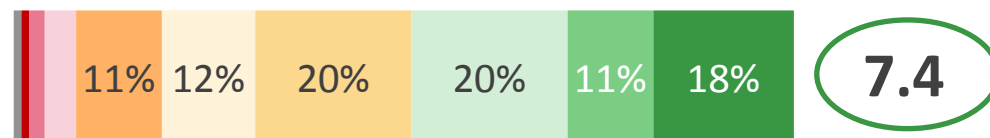
■ N/A ■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements?
Base: S2 All (1608)

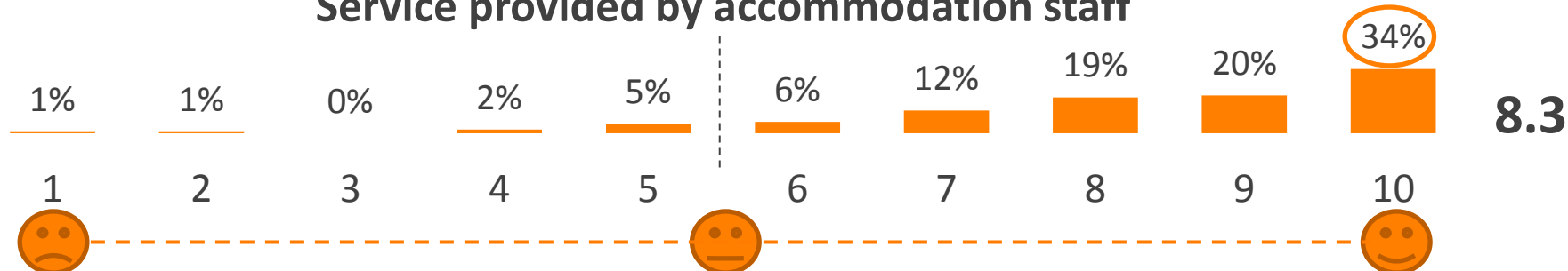# Sustainability

Scotland performs well on key sustainability measures, particularly amongst international visitors

Mean

Scotland is a country which takes care of its natural environment

5% 7% 15% 25% 17% 27%
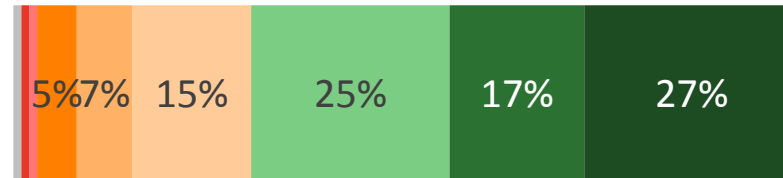
8.2

I was encouraged to behave in an environmentally responsible way

10% 10% 14% 20% 13% 22%
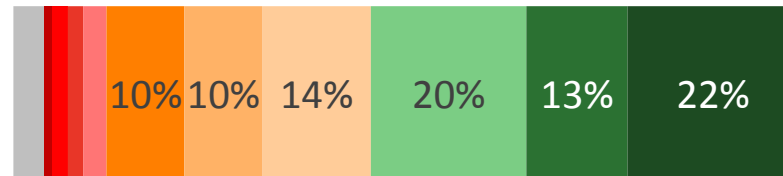
7.5

■ N/A   ■ Disagree strongly   ■ 2   ■ 3   ■ 4   ■ 5   ■ 6   ■ 7   ■ 8   ■ 9   ■ Agree strongly

Scottish residents were least likely to agree that Scotland takes care of its natural environment

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements?
Base: S2 All (1608)

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Impact of locals on visitor experience

The welcome given to visitors was highly praised, and interaction with locals enhanced the visitor experience

Scotland's reputation for friendly people was a motivation to visit for 15% of visitors

Mean

I was made to feel really welcome
19% | 2% | 10% | 20% | 21% | 43% → **8.8**
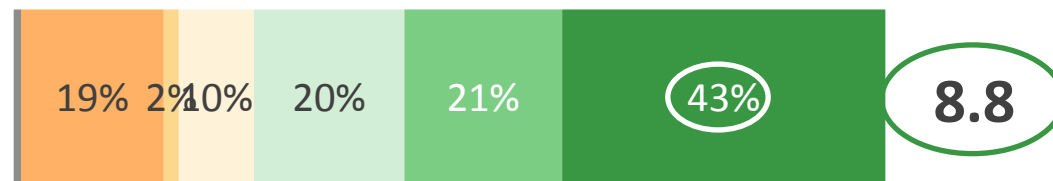
The local people I met during my visit really added to the holiday experience
5% | 8% | 15% | 20% | 16% | 31% → **8.2**
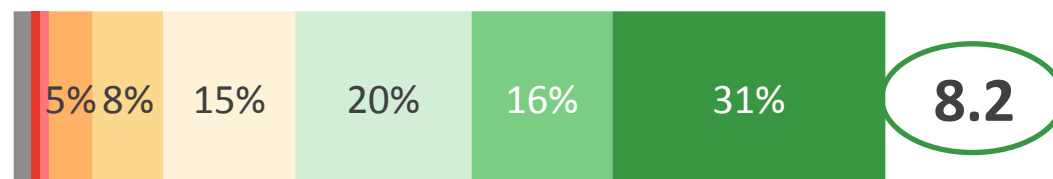
■ N/A ■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

Visitors from the Rest of the World were particularly positive about the welcome they received (9.2) and the local people they met (8.9)

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Customer service levels

High levels of customer service were experienced at key visitor touchpoints

I experienced excellent customer service

Mean

0%	0%	0%	1%	4%	7%	18%	24%	18%	26%
1	2	3	4	5	6	7	8	9	10

8.2

✗ ✓
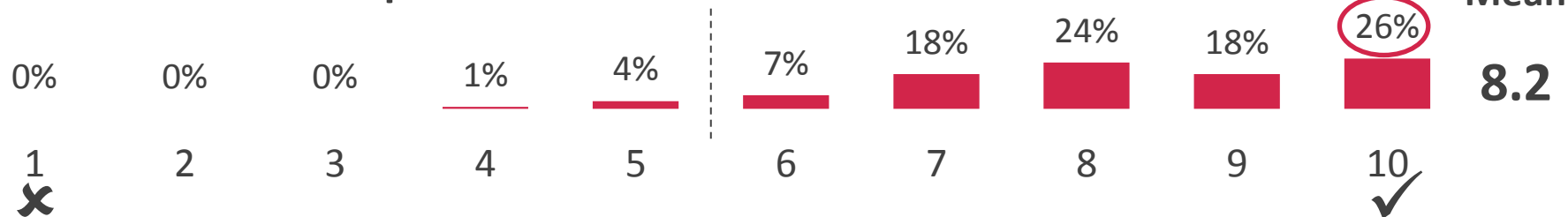
Service provided by accommodation staff

1%	1%	0%	2%	5%	6%	12%	19%	20%	34%
1	2	3	4	5	6	7	8	9	10

8.3

VIC customer service

0%	0%	0%	1%	4%	5%	16%	30%	17%	27%
1	2	3	4	5	6	7	8	9	10

8.3

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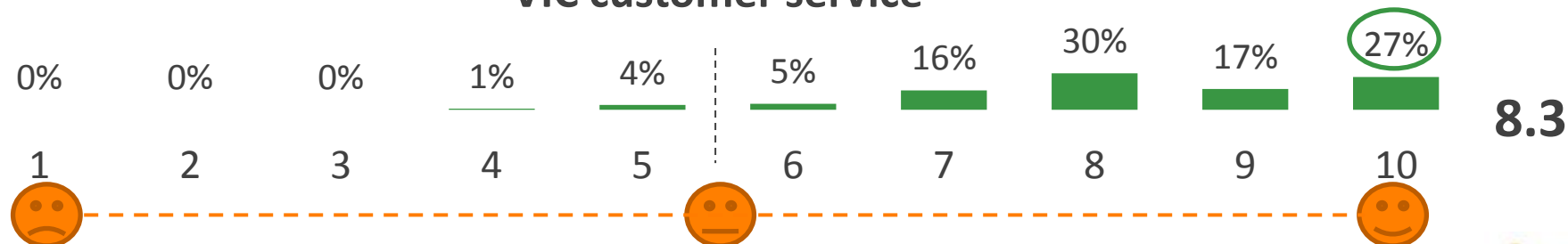
Words to describe people met in Scotland

Overwhelmingly positive words used to describe the people visitors met. Underlines importance of people in delivering an excellent visitor experience

Potential improvements

Half (53%) gave a suggestion of something that would have improved their trip. Key points include improving digital connectivity, and lower costs

Longer stay / more time in Scotland	17%
Lower costs / less expensive	11%
Better roads / signage	11%
Better / free WiFi	10%
Greater 3G / 4G / mobile coverage	9%
Better quality / more local food	7%
Better / cheaper public transport	5%
Better accommodation	4%
Longer opening times	3%
Better currency exchange rate	2%
More information / simpler maps	2%
Fewer midgies / midgie control	2%
Less litter	2%
Better customer service	2%
Better parking	1%
Better drivers	1%
More to do / more activities	1%
Something else	10%

Q54 Apart from the weather, what one improvement would have enhanced your holiday/short break in Scotland? Base: S2 All who gave an answer (847)

Potential improvements – verbatim comments

"A cheap mobile phone roaming deal bundled with an app suggesting points of interest (based on my preferences) while driving through the country. As it is now I didn't use roaming data a lot due to the cost. And free WiFi was not that easy to find in the Highlands ..."

"Better coverage for smart phones. Can't use the maps as can't get coverage."

"Better cell coverage."

"Lower prices for everything. Scotland is overall very expensive compared to North America. Most things were twice what we would pay in Canada."

"better local food availability that doesn't cost an arm and a leg; more choice outside the inevitable restaurant chains; less expensive; better coffee."

"Better rates for single travellers"

"Healthier food options in hotels and restaurants, especially more vegetarian options."

"Cost of attractions, activities, eating out etc."

"At times it was difficult to find places to eat. Many days we were trying to find a place to eat dinner around 7pm and struggled to find restaurants or pubs that were still serving food."

"Better road signage and directions"

"Majority of roads travelled on are in a deteriorating state; potholes, surface crumbling, lack of clear white lining"

Q54 Apart from the weather, what one improvement would have enhanced your holiday/short break in Scotland? Base: S2 All who gave an answer (847)

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Post Trip – Key Takeouts

Takeouts

- Visitors were extremely positive about their experience in Scotland
- The local people visitors interacted with really added to the positive visitor experience, particularly for overseas visitors
  - Described as friendly, helpful, welcoming
- 9 out of 10 visitors said they'd recommend Scotland as a holiday destination
  - But only a small proportion of these have posted reviews about their trip (20% accommodation; 10% eating out)
- No single major improvement was identified as necessary
  - But improving digital connectivity is a recurring theme

Implications

- Focus on continuing to deliver excellent visitor experience
- Reiterate to industry & wider Scottish population the importance of personal interaction with visitors
  - Continued emphasis on providing a warm, friendly welcome
- Harnessing willingness to recommend Scotland could drive growth, given importance of Word Of Mouth in prompting consideration of Scotland
- Work with public sector partners to highlight importance of improvements to digital infrastructure & roads

Recommendations

Loch Achray towards Ben Venue, Stirling

Recommendations for Growth (1)

Continue to deliver a consistently excellent visitor experience

- Clear evidence of this already being done at the overall level

- Expectations are met for most visitors across all aspects of the visitor journey; but could be exceeded for more

- But potential to push higher and deliver 'best holiday ever' for more visitors

Interaction with local people has a significant positive impact on the visitor experience

Scotland's scenery, landscapes, history and culture remain the core features expected of a holiday in Scotland. These are strong across ALL markets.

- Communicating positive messages to industry should help maintain momentum

- Pushing to exceed expectations and deliver the 'best holiday ever' should give Scottish Tourism industry something to aim for
  - Potential to focus on budget sector where expectations not currently being met

- Continuing commitment to delivering high service levels from industry

- Encourage ordinary people across the country to interact with visitors
  - Emphasising the friendly, helpful impression of Scottish residents that is clearly endorsed by visitors

- Marketing Scottish tourism should continue to play to these strengths and highlight these core features in interesting and appealing ways.

- In addition visitors value interaction with local people highly which can enhance their whole experience

Recommendations for Growth (2)

Harnessing the power of user generated feedback

- Recommendations from friends / family are influential in decision to choose Scotland as a destination
- User generated reviews are widely used throughout holiday planning process (44%) but fewer post reviews
  - (20% accommodation; 10% eating out)
- Visitors state very high levels of willingness to recommend Scotland – 56% score 10/10

Continued improvement of key aspects of visitor experience

- Especially those with lower satisfaction ratings – namely digital connectivity and value for money of food & drink

Promotion of repeat visits amongst first time (as well as existing repeat) audiences

- We know 9 in 10 think Scotland is worth visiting more than once

Challenge = how to push visitors to actively recommend Scotland to others

- Encourage visitors to give feedback about their experience
  - Social media, travel review sites
- Potential to facilitate online sharing
  - Photos, 'insider tips', best holiday moments
- Build in recommendation focused activity to local marketing plans

- Particular emphasis on improving digital connectivity - mobile phone signal, availability of 3G/4G, access to free WiFi
- Encourage food & drink providers to promote local produce and offer affordable, good value options for eating out
  - E.g. through Taste our Best scheme and other industry initiatives

- Create sense of 'need' to come back
  - Demonstrate & communicate the breadth of things to see / do; variety of experiences on offer whilst visitors are *in Scotland*
- Emphasise transport links (& ease of reach for UK market)

The Scotland Visitor Survey 2015 was conducted for VisitScotland by Jump Research.
For further information please contact:
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research@visitscotland.com www.visitscotland.org