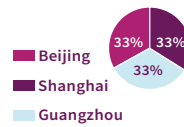


# UNDERSTANDING CHINESE HOLIDAYMAKERS

In summer 2019, VisitScotland conducted exploratory consumer research among active outbound holidaymakers from the three largest cities in mainland China. The research explored holidaymakers' aspirations, motivations, planning and booking behaviour related to overseas leisure trips, as well as their perceptions of Scotland. The research participants were travellers aged 25 to 45 who have a propensity for long haul trips outside of Asia. A group of recent Scotland visitors were also included to find out their holiday experience in Scotland. Combined quantitative and qualitative methodologies were used in this research.

## DEMOGRAPHICS



**GENDER:**  
44% Male 56% Female

**AGE GROUP:**  
25-45

**SAMPLE BASE:**  
N=1502  
Beijing-502 | Shanghai-500  
| Guangzhou-500

**Fieldwork Period**  
May - July 2019 (Kubi Kalloo)

- Key decision makers in travel parties
- Travelled outside of Asia in the past two years or intend to have holidays outside Asia in the next two years
- Owners of valid passports

## HOLIDAYMAKERS ARE MOTIVATED BY

### SEEKING QUALITY TIME IN NATURAL BEAUTY



**92%** Coastlines and islands

**92%** The great outdoors

**91%** Lakes, mountains and grasslands

### SOAKING UP THE LOCAL CULTURE

**86%** Attending distinctive events/activities

**94%** Eating local delicacies

**79%** Chatting to locals

**90%** Visiting historical sites and traditional buildings



**75%** Experiencing luxury and high end retail shopping

**87%** Shopping for souvenirs and local products



### GETTING AWAY FROM IT ALL



**93%** Spending quality time with family and friends

**89%** Escaping everyday routine

**91%** Improving physical and mental wellbeing



**77%** Switching off and relaxing



## PLANNING AND BOOKING

### ONLINE TRAVEL AGENCIES, TRAVEL REVIEW SITES AND SOCIAL MEDIA

play an important role in the planning and booking stages

#### PLANNING



**49%** Online travel agents



**49%** Travel review websites



**46%** Social media



**45%** Searched for destination images



**44%** Checked visa/entry requirements

### BOOKING

Travel Accommodation Itinerary



**63%** Online travel agency



**37%** Website or mobile app of a tour operator



**32%** Directly with the provider's website



**23%** Local tourist information centre



**23%** Purchased tickets in person at the venue on the day

## PERCEPTIONS OF SCOTLAND

“ Full of proud history and heritage ”

“ A great destination for active/outdoor pursuits ”

“ With breath-taking natural scenery ”

“ A place I can spend quality time with friends or family ”

“ A non-touristy destination where I can truly enjoy myself ”

“ A place to socialise with local people ”

“ A place to enjoy local delicacies ”

“ Good value for money when compared to London, Switzerland and the Nordic countries ”

## WHAT PEOPLE ASSOCIATE WITH SCOTLAND

### THOSE STILL TO VISIT

bagpipes, castles, kilts and whisky

### THOSE WHO HAVE VISITED

bagpipes, castles, whisky, nature, wildlife, escapism, outdoor activities and friendly locals

## VISITOR EXPERIENCE IN SCOTLAND

### WHAT INSPIRES OUR VISITORS



**29%** Specific interest  
such as whisky, golf or film



**26%** Online videos

**33%** Iconic sights and tourist attractions



**29%** Information from offline travel agents



**26%** Travel guidebook

**25%** Information from official destination websites



**31%** Read something on social media

**29%** Travel review sites/apps

**26%** Travel website/apps

**25%** Word of mouth recommendations

### SCOTLAND IS A PART OF A WIDER UK TRIP FOR MOST VISITORS



### MOST POPULAR DESTINATIONS

Edinburgh, Glasgow, The Highlands and The Loch Lomond area

### HOTELS ARE THE MAIN TYPE OF ACCOMMODATION

87% stayed in hotels, over half chose 5-star or 4-star hotels and 20% used Airbnb

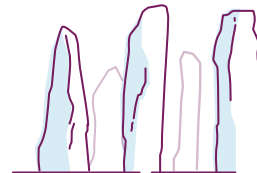
### TOP ACTIVITIES

Experiencing coastlines and islands



Viewing ancient and traditional buildings and artefacts

Visiting lakes, mountains and grasslands



Visiting historical sites and heritage wonders

Enjoying the great outdoors

Experiencing gourmet and luxury foods



Shopping for high-end goods, souvenirs and local products

Trying local delicacies

### Unexpected experiences that wowed visitors

Attending events

Seeing wildlife in its natural habitat

Experiencing some adventure or thrill

Visiting art exhibitions

Road tripping

Meeting new people

### LIKELIHOOD TO RETURN

**87%**



said they would like to return to Scotland in the next 2 years

Sample Base: visitors n=541

### CONTACT DETAILS

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[@VisitScotland](#)

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[@VisitScotland](#)

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