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VisitScotland.com  
&  
Tripadvisor

Presentation of Research Results

# Agenda

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**Background/objectives of research**



**Methodology**

**Respondent profile**

**User generated content**

**Tripadvisor**

**Travel review sites vs Star gradings**

**VisitScotland and Tripadvisor**

**Business results**

**Conclusions & recommendations**

# Objectives of Research

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- To establish which User Generated Content (UGC) consumers use during trip planning/booking (specifically, if they use Tripadvisor)
- To identify general perceptions and attitudes towards UGC
- To gain feedback on attitudes and perceptions of Tripadvisor reviews specifically (including their perceived objectivity and usefulness)
- To estimate the influence of Tripadvisor reviews on planning/booking decisions
- To identify attitudes held about having the Tripadvisor widget on the VisitScotland.com site (including appropriateness, usefulness, convenience)

# Methodology

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- A user survey (using an overlay) was placed on VisitScotland.com for 2 weeks in October 2009.
- Total response – 1986
- Incentive for customer survey – Scottish food hampers
- 3 identical business surveys were sent to 3 samples (total responses in brackets)
  - Businesses who have the Tripadvisor Widget (162)
  - Businesses who were offered the widget but declined to take it (24)
  - Businesses who don't have a widget (and weren't offered it) (277)

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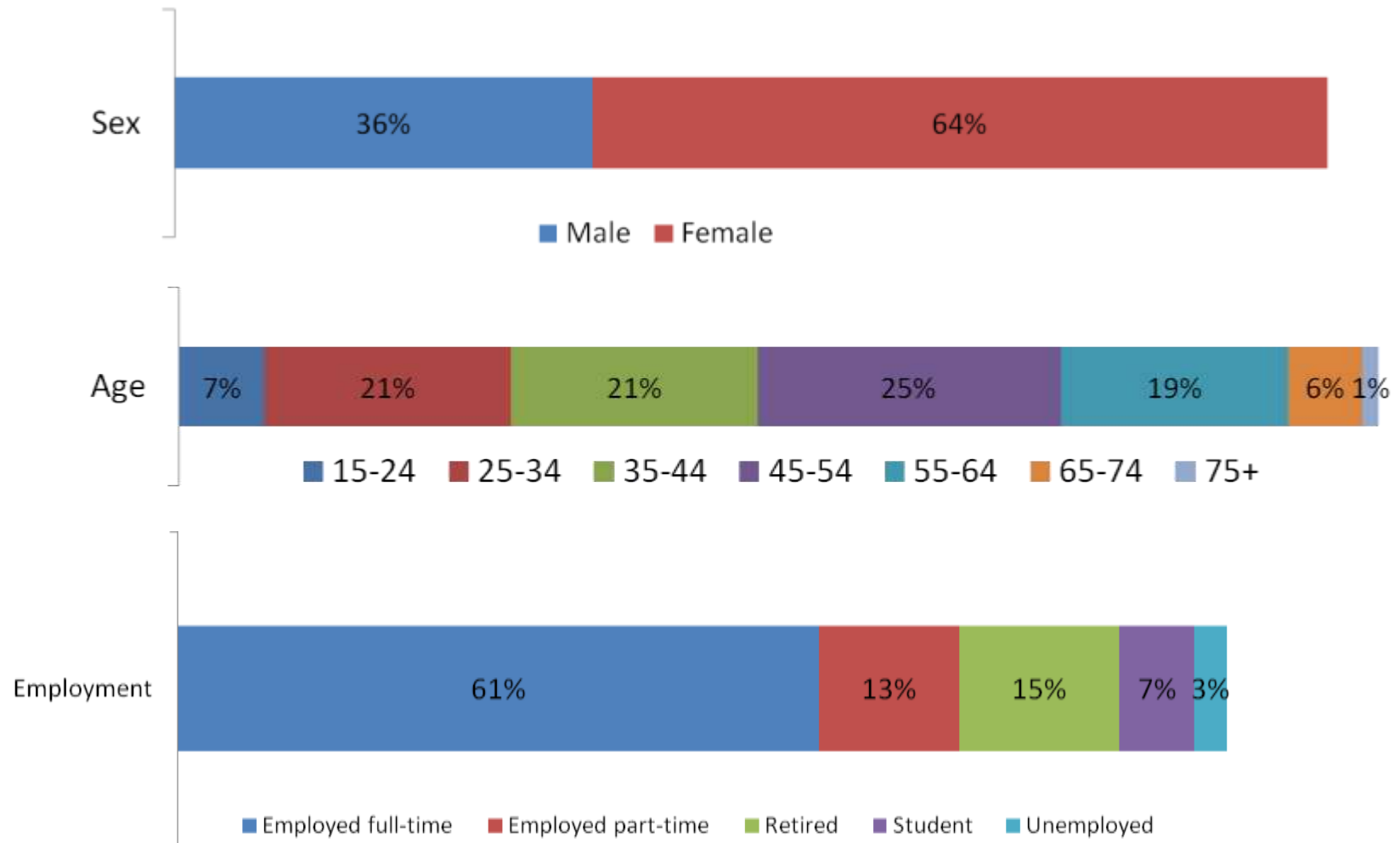
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Business results

Conclusions and recommendations

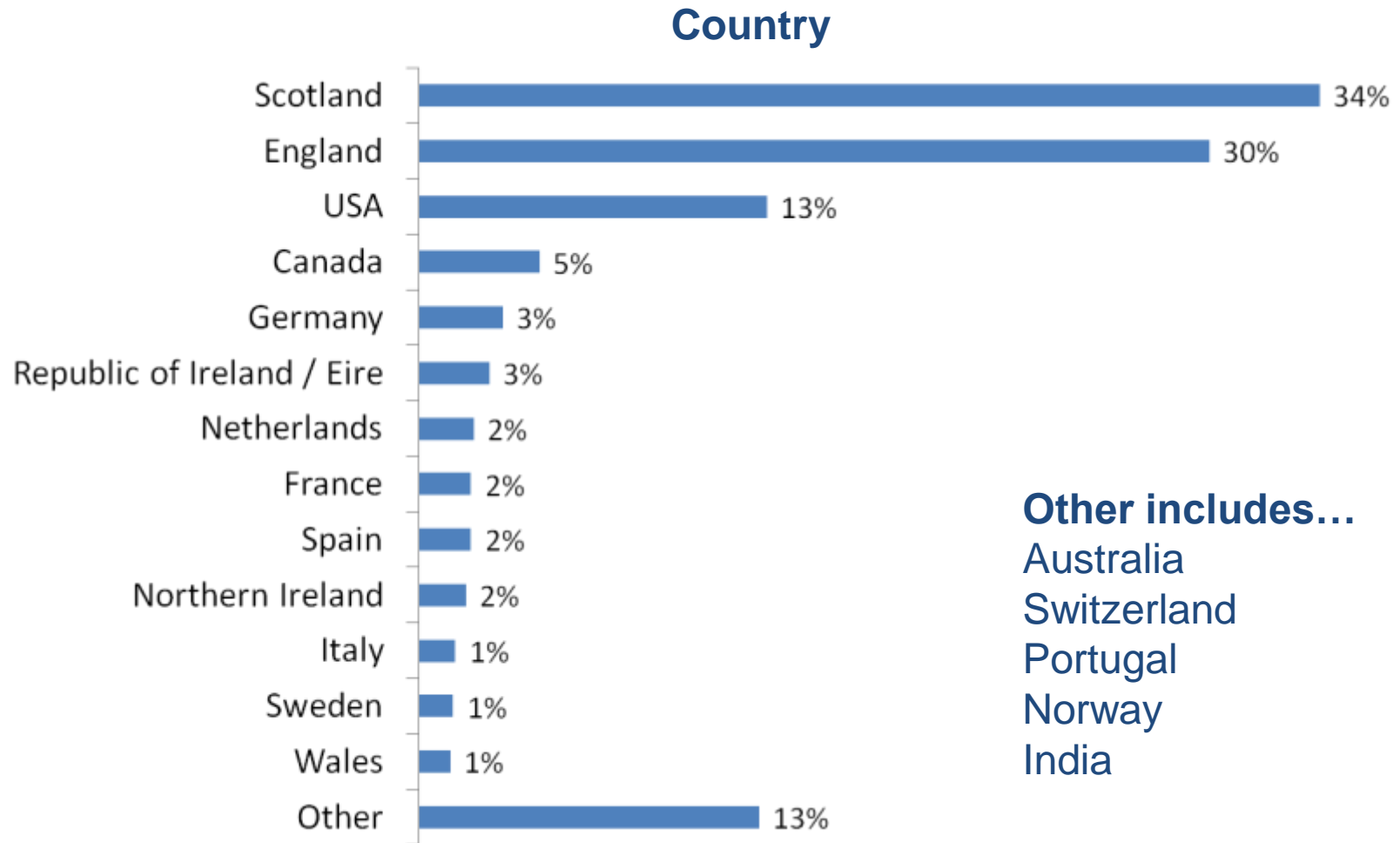


# Customer Survey - Demographics



# Customer Survey - Demographics

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# Business Respondents - Overview

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Which of the following best describes your business?



- Bed & breakfast/Guest house
- Small hotel (under 30 rooms)
- Medium hotel (30-100 rooms)
- Large hotel (100+ rooms)
- Self-catering
- Hostel

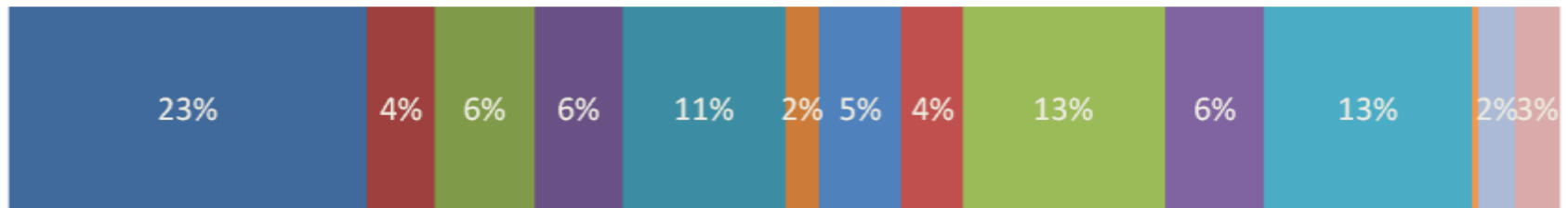
What star grading does your business have?



- 1 star
- 2 star
- 3 star
- 4 star
- 5 star
- Awaiting grading
- Not graded

# Business Respondents - Overview

In which of the following regions is your business located?



- The Highlands of Scotland and the Island of Skye
- Loch Lomond & the Trossachs
- Perth / Perthshire
- Dumfries & Galloway
- Argyll & the Isles
- Edinburgh City & Lothians
- Orkney
- Glasgow & the Clyde Valley
- Aberdeen & Grampian Highlands
- Angus & Dundee
- Scottish Borders
- Kingdom of Fife
- Shetland
- Western Isles

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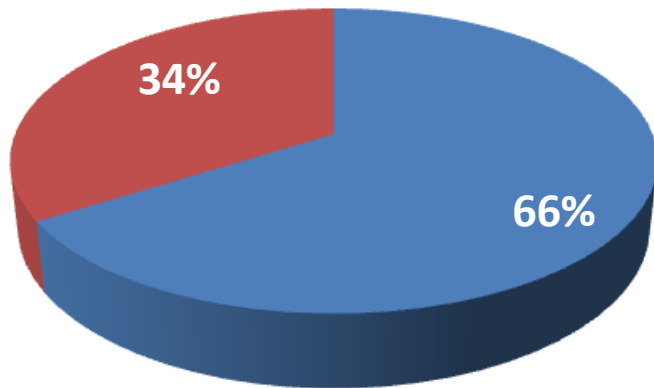
Conclusions and recommendations



# Visiting travel review sites

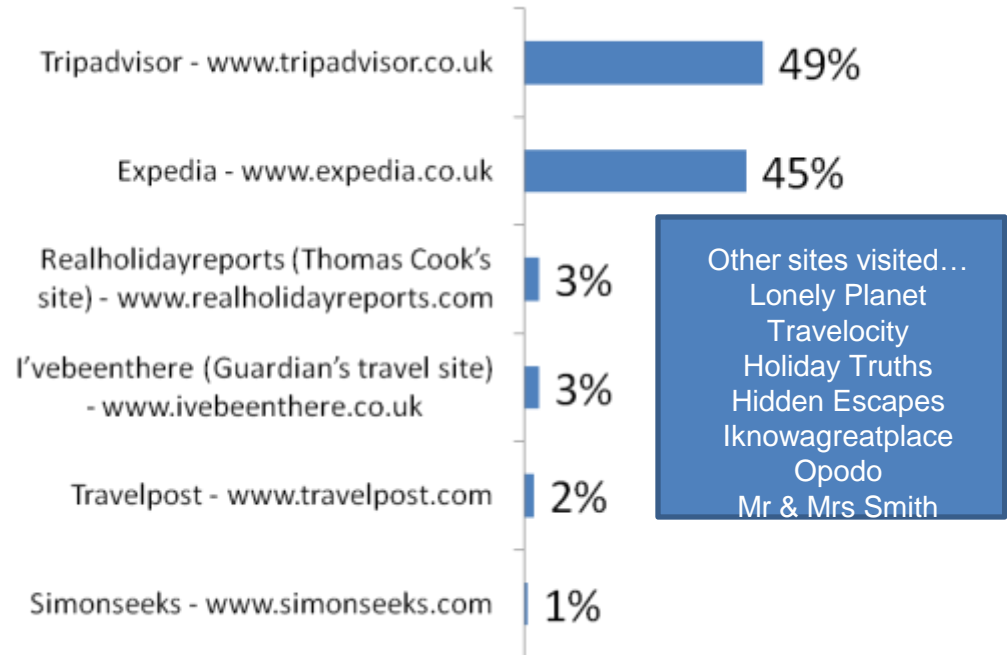
Tripadvisor and Expedia are the most popular travel review sites

Have you ever visited a travel review site?



- Have visited a travel review site
- Have never visited a travel review site

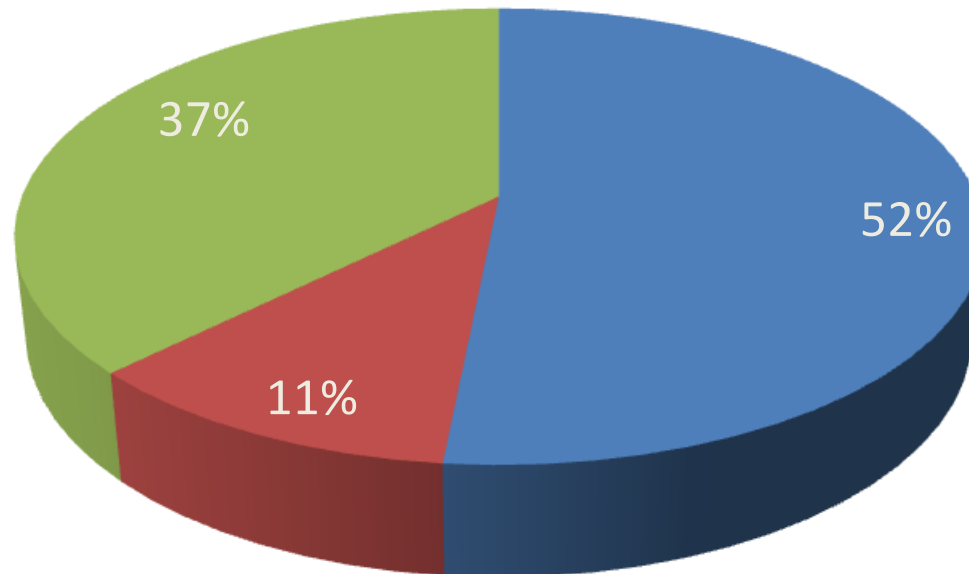
Have you ever visited any of the following travel review sites?



# Would you consider visiting a travel review site in the future? (non-visitors)

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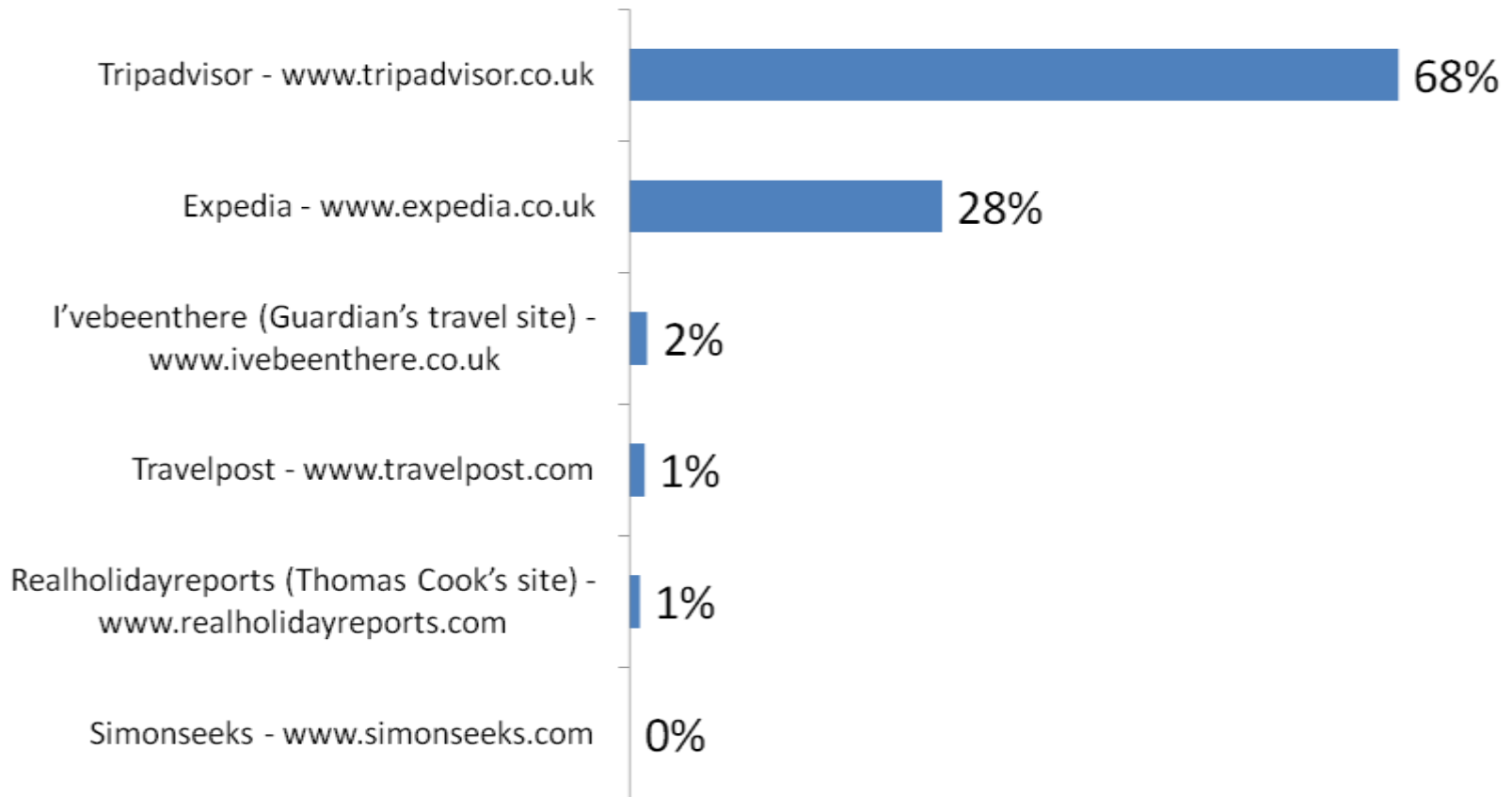
Over half of respondents who haven't visited a travel review site would consider doing so in the future



■ Yes ■ No ■ Don't know/not sure

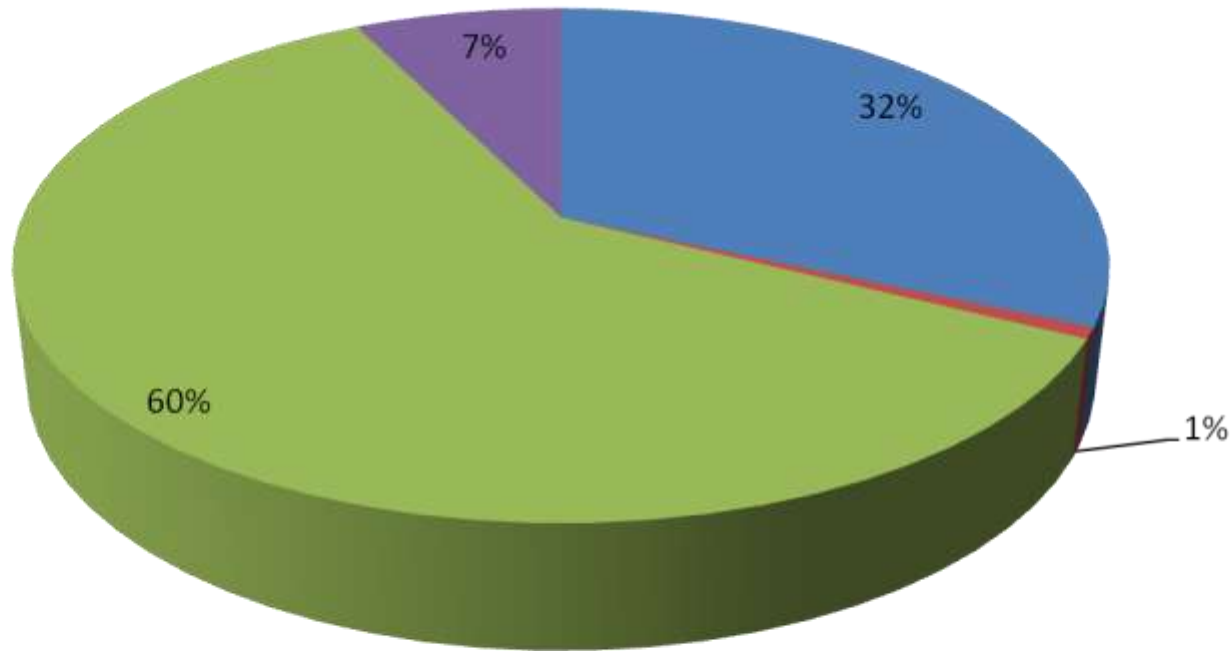
# Which of the following travel review sites is your favourite?

Tripadvisor is the most popular travel review site overall



# Have you ever written/posted an accommodation review on a travel review site?

The majority have not posted a review but would consider it in the future



- Yes and I would do so again in the future
- Yes but I wouldn't do so again in the future
- No but I would consider in the future
- No and I wouldn't consider

# Why would you not consider writing/posting an accommodation review? (70)

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Lack of time/inclination are the most common reasons for not posting reviews

*No time or inclination. I would only if I felt very strongly about somewhere*

*not sure anyone would read it! and busy enough already!*

*There is already an abundance of information/reviews. I prefer to get my information from the official sites (i.e. [visitScotland.com](http://visitScotland.com))*

*because my view will always be different from others, everyone has different thoughts on what they want from an accommodation*

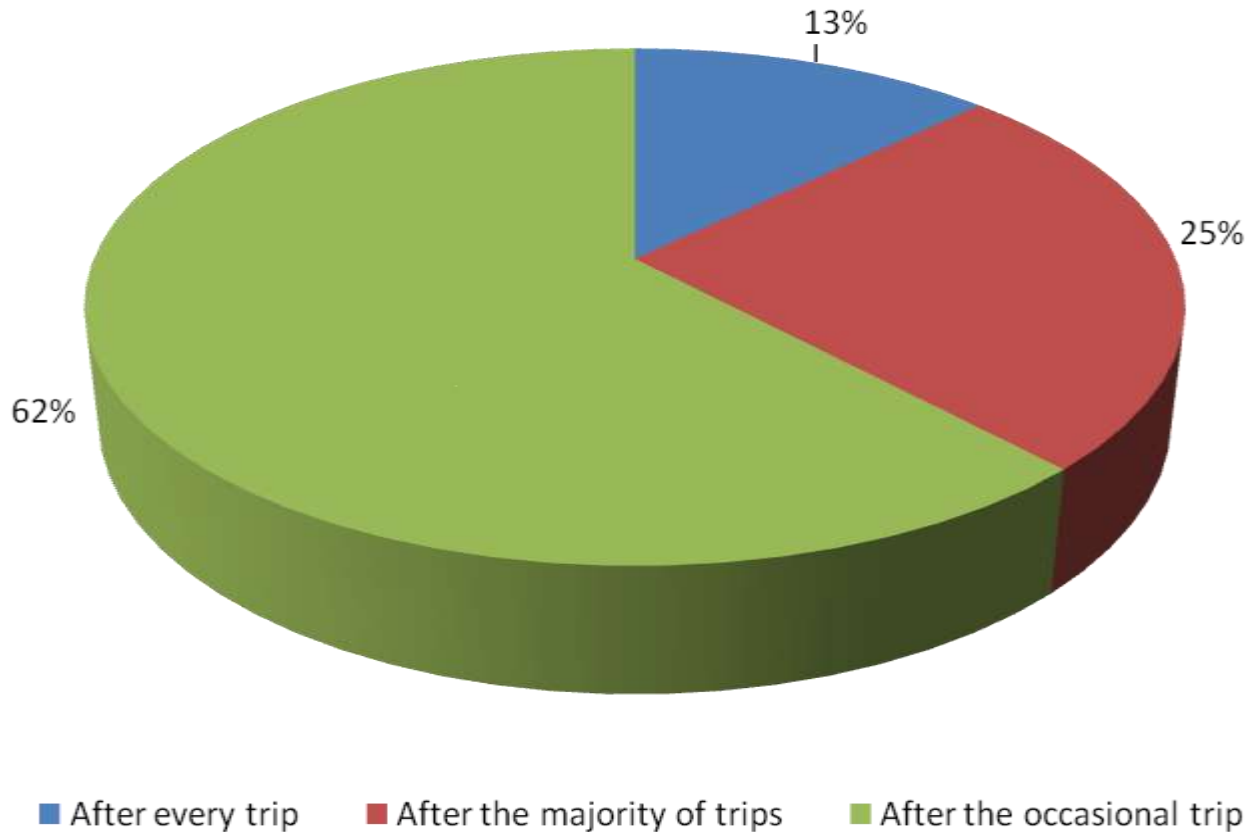
*Don't feel qualified or experienced enough*

*no interest in sharing my experiences*

*Haven't got the time*

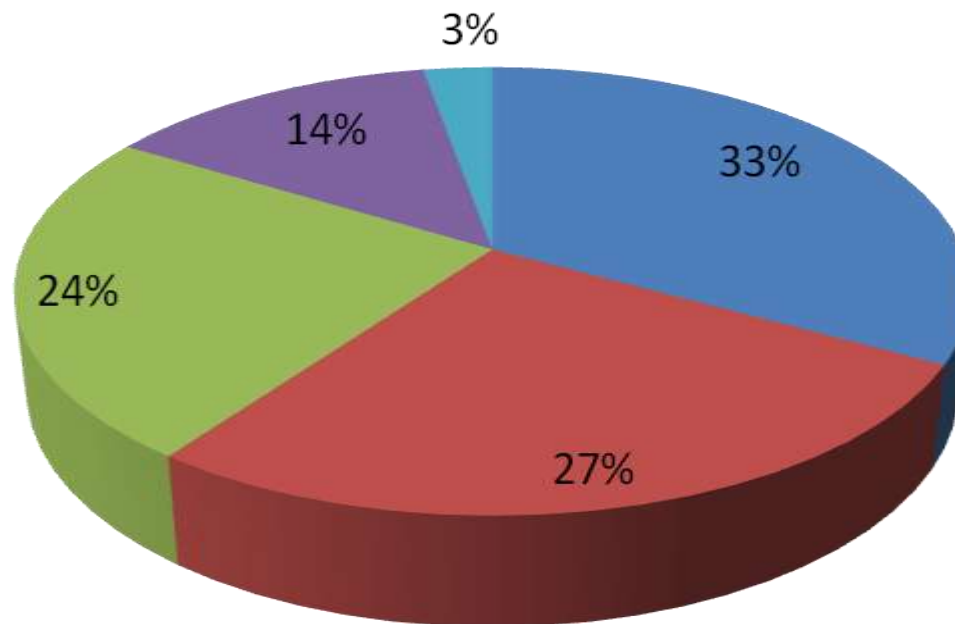
# How frequently do you write/post reviews of accommodations on travel review sites?

The majority comment infrequently



# How often do you consult travel review sites when planning and booking your holidays?

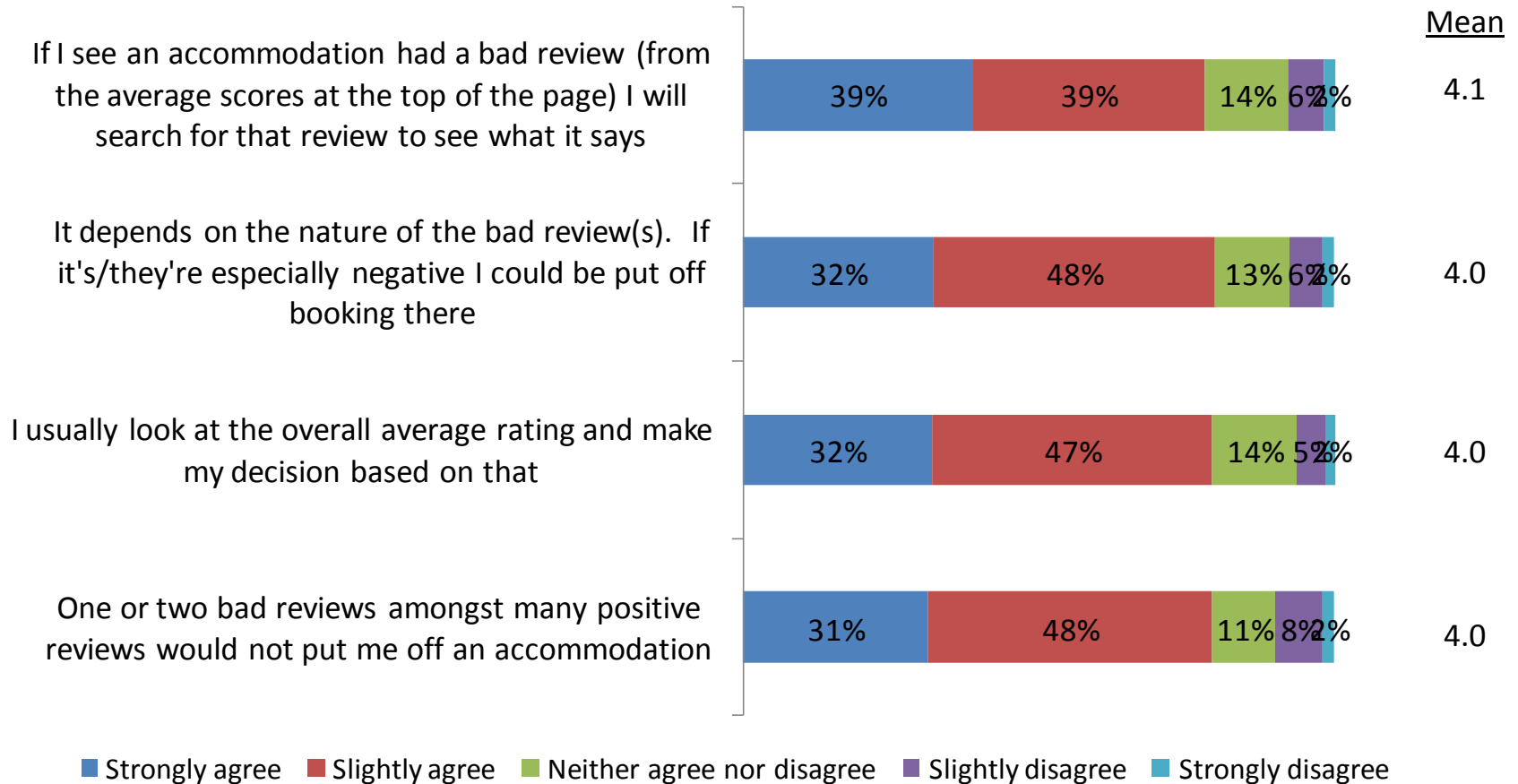
A third of respondents visit travel review sites for every trip



- I consult travel review sites for every trip
- I consult travel review sites for some trips
- I never consult travel review sites

- I consult travel review sites for the majority of trips
- I consult travel review sites only for the occasional trip

# Travel review site statements



5=Strongly agree/1=Strongly disagree

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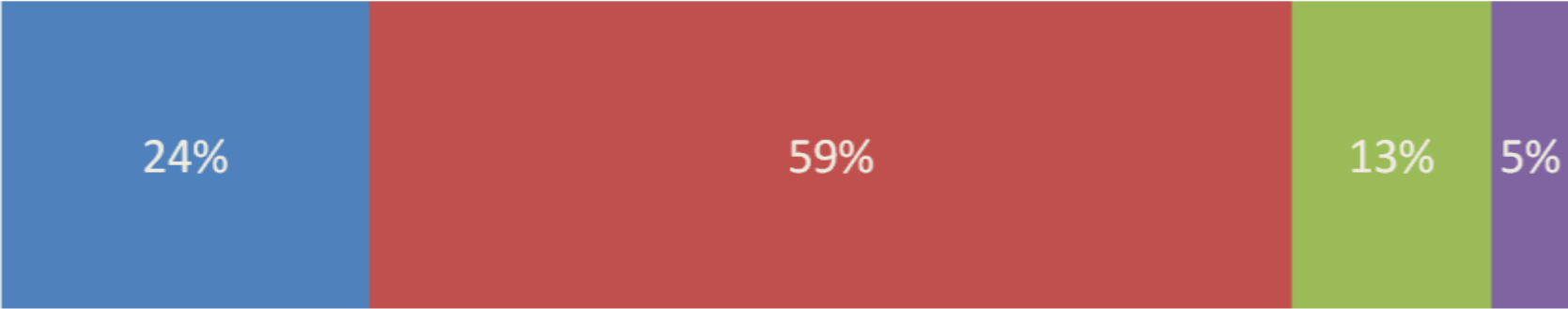


# To what extent do the reviews on Tripadvisor website influence your holiday decisions (e.g. planning and booking)?

Have visited Tripadvisor

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Over 80% of Tripadvisor users believe the reviews influence their holiday decisions



■ Strongly influence   ■ Slightly influence   ■ Neither/nor   ■ Don't influence



# What do you like best about Tripadvisor?

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“Simplicity in the format but abundant in information”

“Its user-friendly nature as well as the wealth and range of information”

“Includes comments and views from 'real' people”

“Reviews are pretty reliable - holidays booked after consulting this site have been very successful”

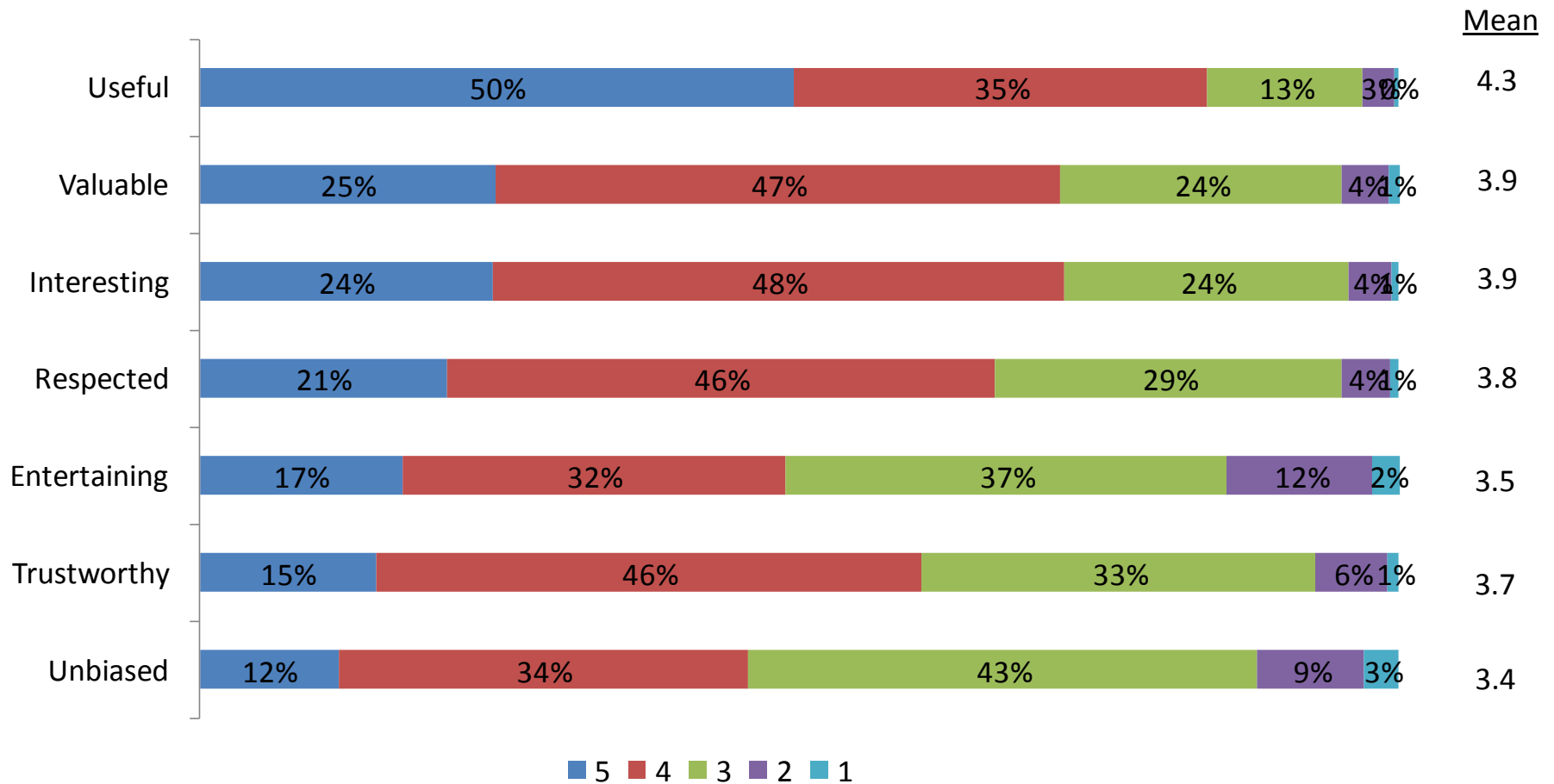
“clear and up to date information from unbiased reviewers good, comprehensive information (not just the marketing spin)”







# To what extent do you agree or disagree with the following words when thinking about Tripadvisor?



5=Strongly agree/1=Strongly disagree

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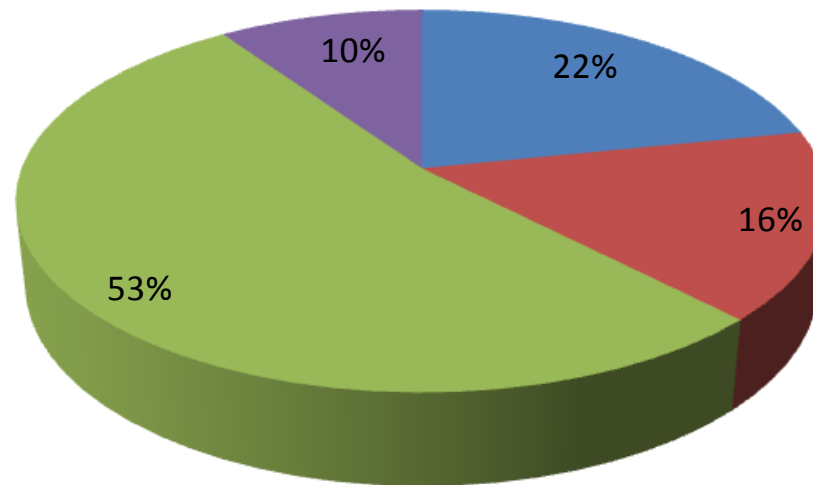
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# Which of the following best describes how you are influenced by official star gradings and travel review sites?

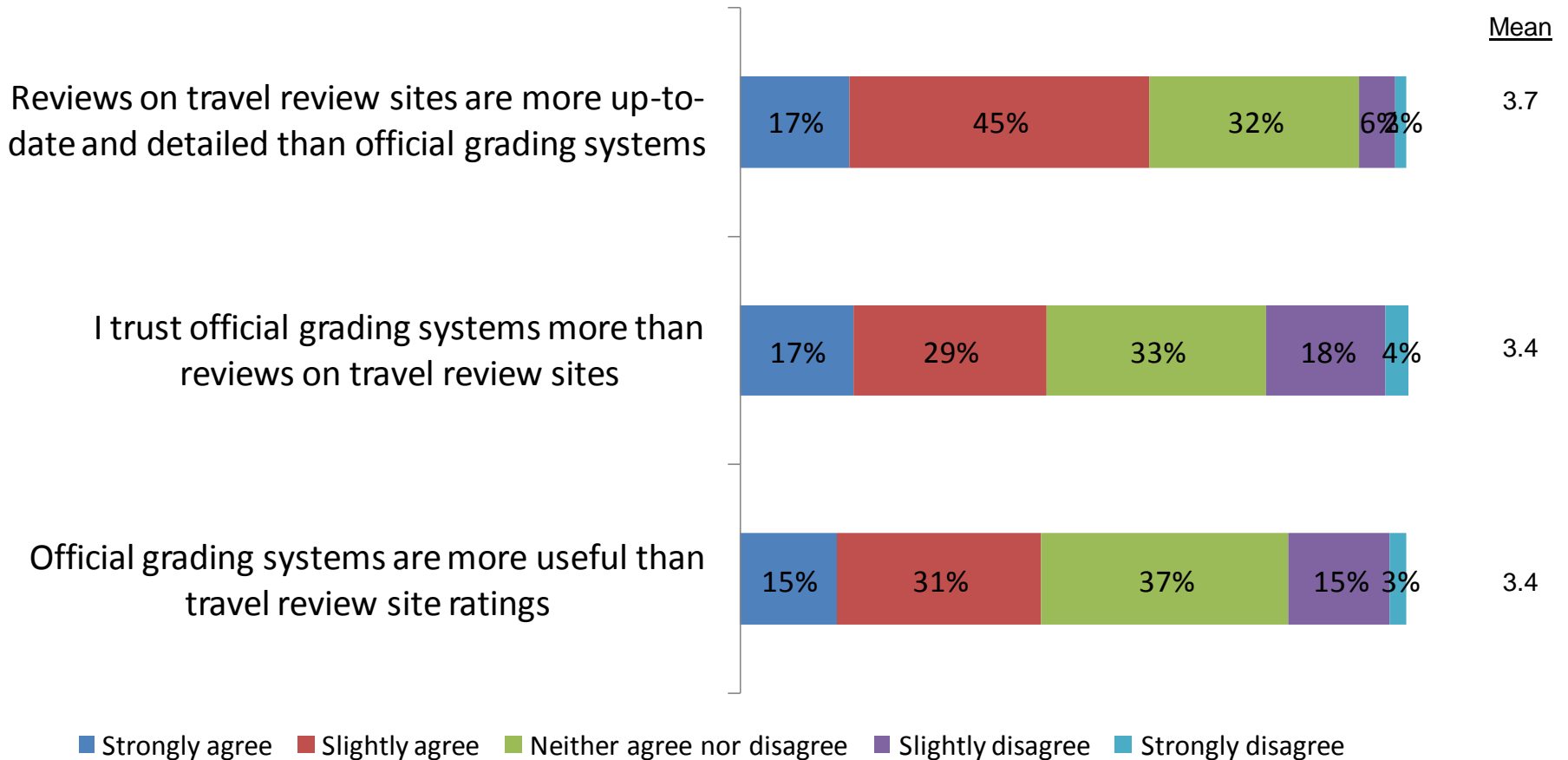
Using star gradings and travel review sites in conjunction with each other is more popular than using either system individually



- I prefer referring to official star gradings
- I prefer reading reviews from other travellers
- I use both official star gradings and reviews from travel review sites equally
- I don't use either system

# Travel Review Sites vs Official Star Gradings- Statements

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5=Strongly agree/1=Strongly disagree

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Methodology

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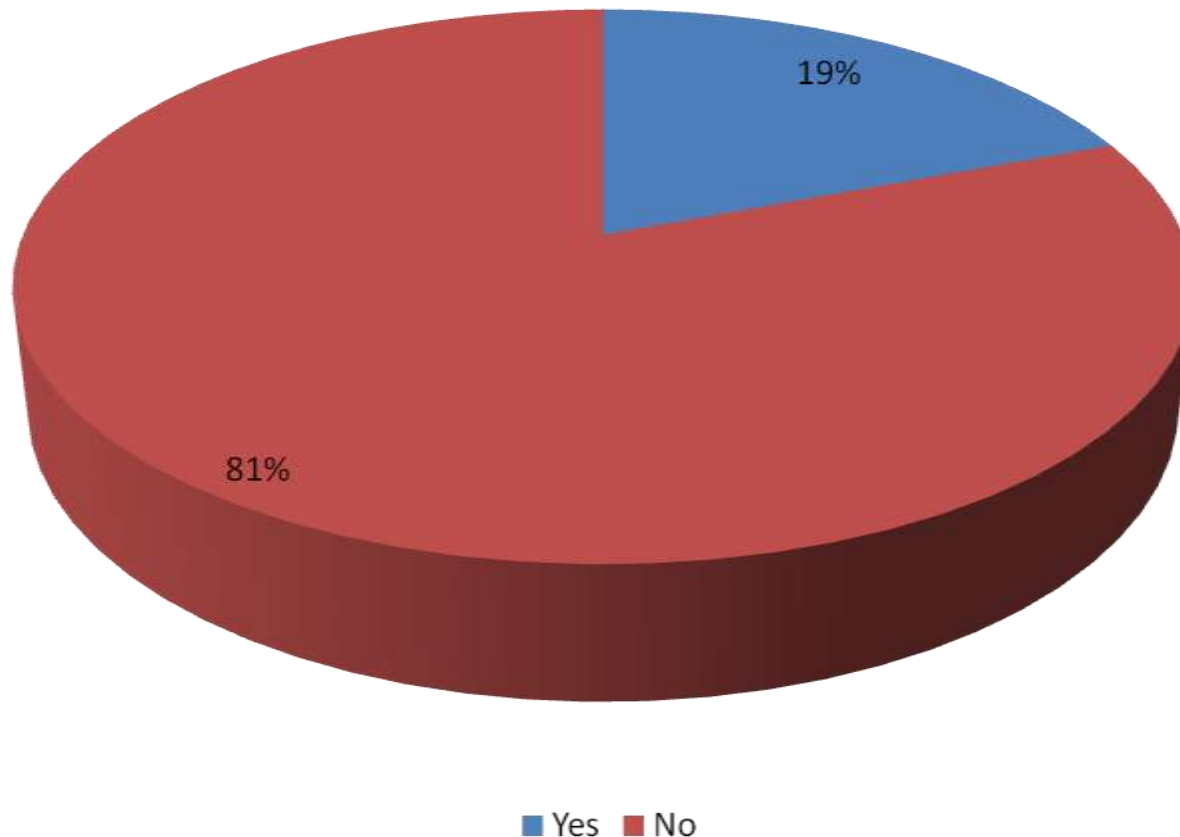
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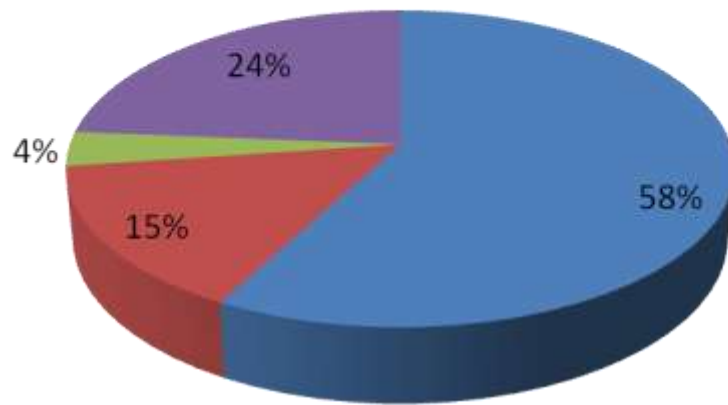
# Have you noticed any Tripadvisor reviews on VisitScotland.com

Over 80% of respondents had not noticed any Tripadvisor reviews on VisitScotland.com



# In future, do you think all accommodation (including self-catering accommodations, hostels etc) featured on VisitScotland.com should include Tripadvisor reviews?

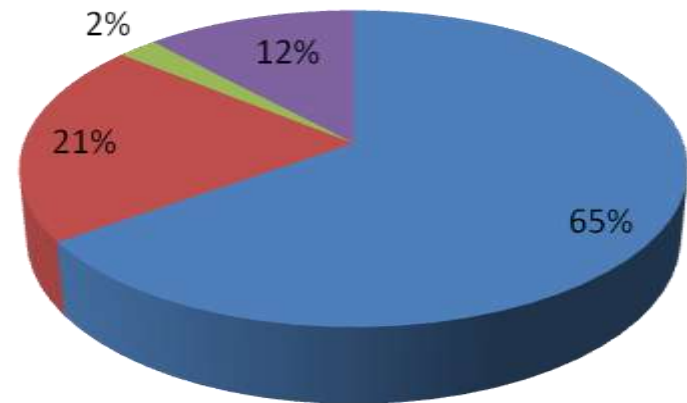
Almost 60% of all respondents think all accommodation on VisitScotland.com should feature Tripadvisor reviews



All

- Yes - all accommodation on VisitScotland.com should feature Tripadvisor reviews
- No - VisitScotland.com is fine as it is with only some accommodations featuring Tripadvisor reviews
- No - I don't think any accommodation on VisitScotland.com should feature Tripadvisor reviews
- I don't know/unsure

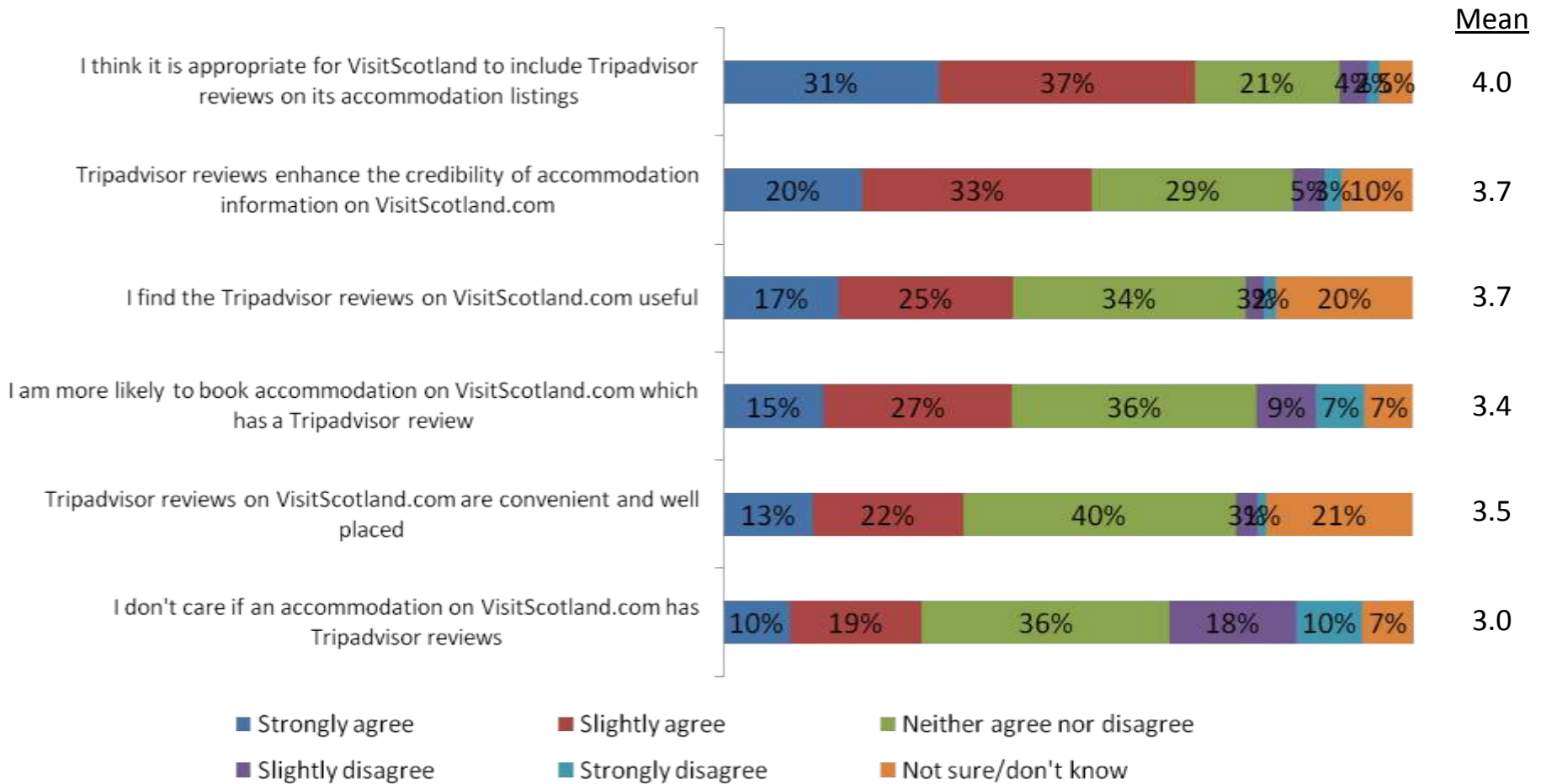
This figure rises to 65% amongst those who have seen Tripadvisor reviews on VisitScotland.com



Have noticed Tripadvisor reviews on VisitScotland.com

- Yes - all accommodation on VisitScotland.com should feature Tripadvisor reviews
- No - VisitScotland.com is fine as it is with only some accommodations featuring Tripadvisor reviews
- No - I don't think any accommodation on VisitScotland.com should feature Tripadvisor reviews
- I don't know/unsure

# To what extent do you agree with the following statements? All

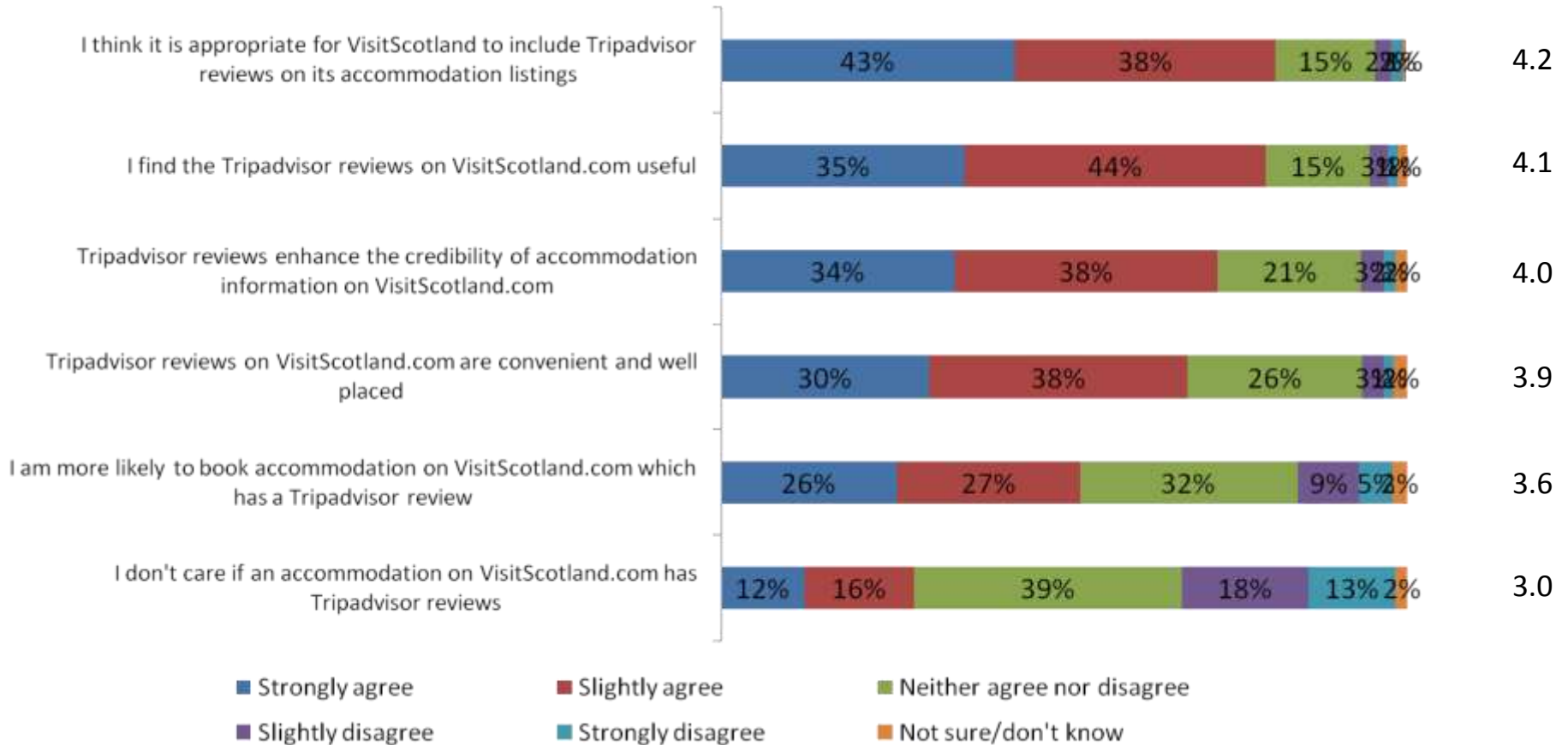


5=Strongly agree/1=Strongly disagree

# To what extent do you agree with the following statements? – All who have noticed Tripadvisor reviews on VisitScotland.com

'Strongly agree' figures increase amongst those who have noticed Tripadvisor reviews on VisitScotland.com

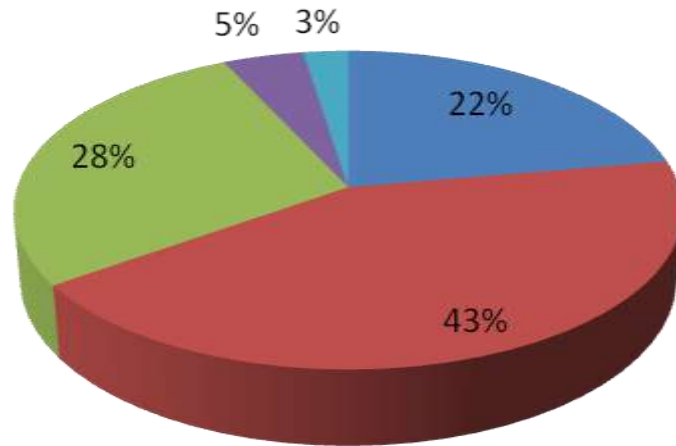
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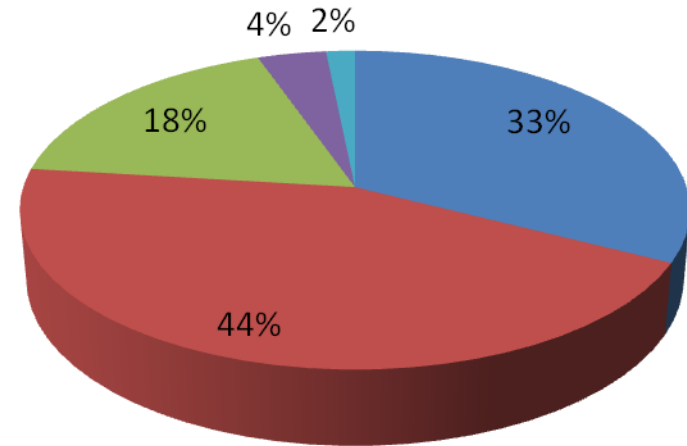
5=Strongly agree/1=Strongly disagree

# How interested would you be to see Tripadvisor reviews on visitor attractions on VisitScotland.com?

'Very interested' figures increase to a third amongst those who have noticed Tripadvisor reviews on VisitScotland.com



All



Noticed Tripadvisor reviews on VisitScotland.com

- Very interested
- Quite interested
- Neither interested nor disinterested
- Quite disinterested
- Very disinterested

- Very interested
- Quite interested
- Neither interested nor disinterested
- Quite disinterested
- Very disinterested

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# Sample groups

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## **“Declined”**

Business who were offered widget but declined (19)

## **“With widget”**

Business who were offered widget and accepted (133)

## **“Not offered”**

Business who were not offered widget (220)

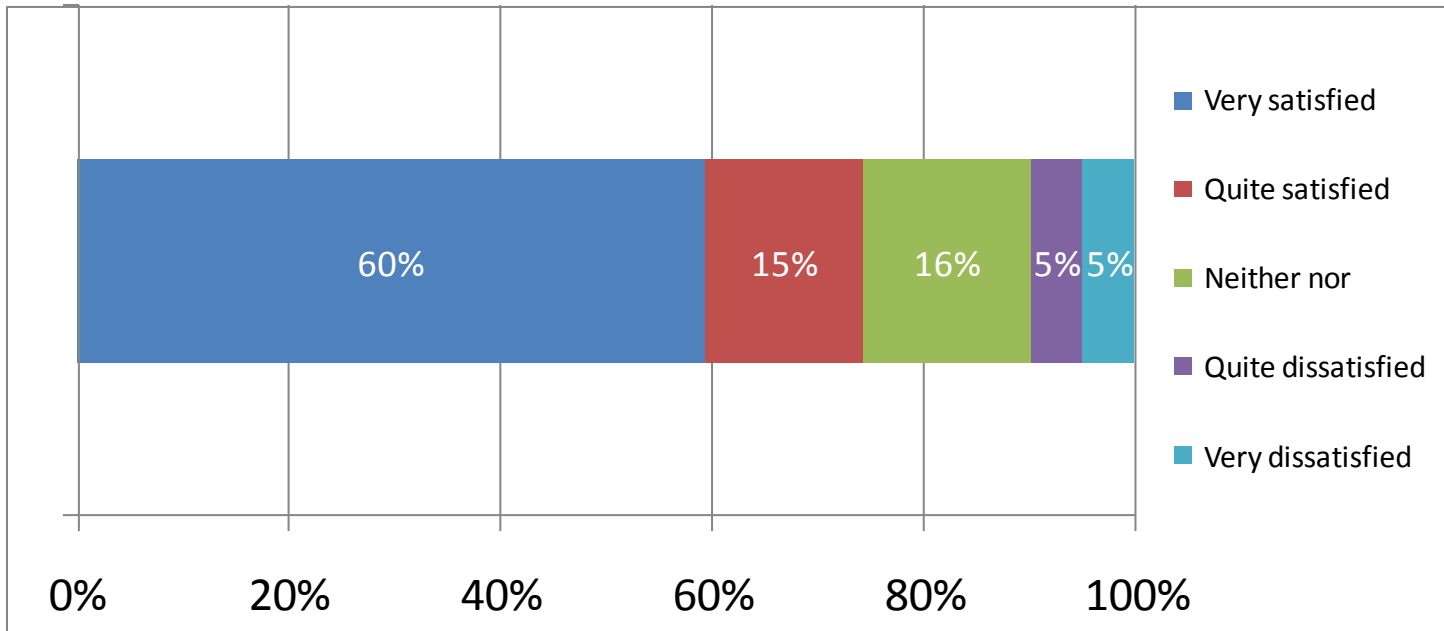


All businesses who took part the survey

Please note: All sample groups had to be “cleaned” of respondents who were atypical of their group

# Satisfaction with widget

Two-thirds of widget holders satisfied with having it



Q3: How satisfied are you with having Tripadvisor reviews on your VisitScotland.com listing?

Base: With widget (133)



# Why satisfied with widget

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“Because they tell everyone how good we are!”

“Another useful marketing device that makes us stand out from the competition [...]”

“[...]VisitScotland rating system does not distinguish between providers sufficiently. The reviews more accurately reflect the reality of the visitor experience”

“It reinforces the VisitScotland grading [...]”

“Good reviews bring more bookings”

“Tripadvisor is the most comprehensive review site currently available”

“There are substantial issues with Tripadvisor but on balance it is a good thing... VisitScotland.com becomes a “one-stop” shop for choosing accommodation”

*Q5: Please tell us why you are satisfied with having Tripadvisor reviews on your VisitScotland.com listing*

*Base: With widget and satisfied (87)*



# Why not satisfied with widget

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“The reviews are by people who have had a personality clash with staff so they write a nasty review”

“We get amazing remarks in our guest book but most of our guests do not use Tripadvisor ... we feel we may not be getting as many guests as other businesses with large numbers of reviews”

“I have worked hard to achieve a 4 star rating and do not like the way in which Tripadvisor number each B&B out of 10”

“We strongly object to people being able to go on a web site and say what they think behind our backs [...]”

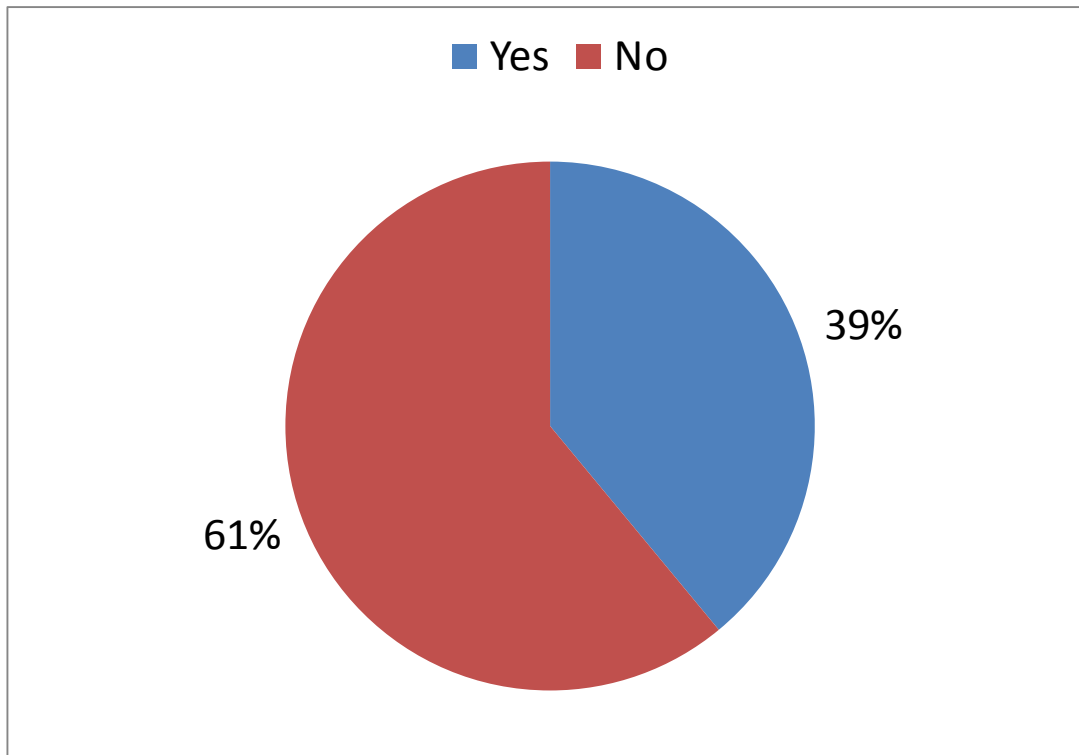
“If VisitScotland are to tacitly accredit Tripadvisor reviews they need to ensure that Tripadvisor police their content”

*Q4: Please tell us why you are not dissatisfied with having Tripadvisor reviews on your VisitScotland.com listing*

*Base: With widget but not satisfied (12)*

# Feedback from customers

Roughly four-in-ten had feedback from their customers on the widget



Q6: Have you had any feedback from customers regarding Tripadvisor reviews on your VisitScotland.com listing?

Base: With widget (130)



# Feedback from customers

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“Guests have booked with us as a result of good reviews”

“Some guests have said they found us on VisitScotland and also saw our reviews”

“They tell us the silly immature reviews are wrong”

“Very positive. They all said the reviews were accurate and encouraged us to get more”

“They said that if it was not there they would have gone to check it out anyway”

“The guests say they value Tripadvisor reviews from real guests equally if not more than the VisitScotland ratings”

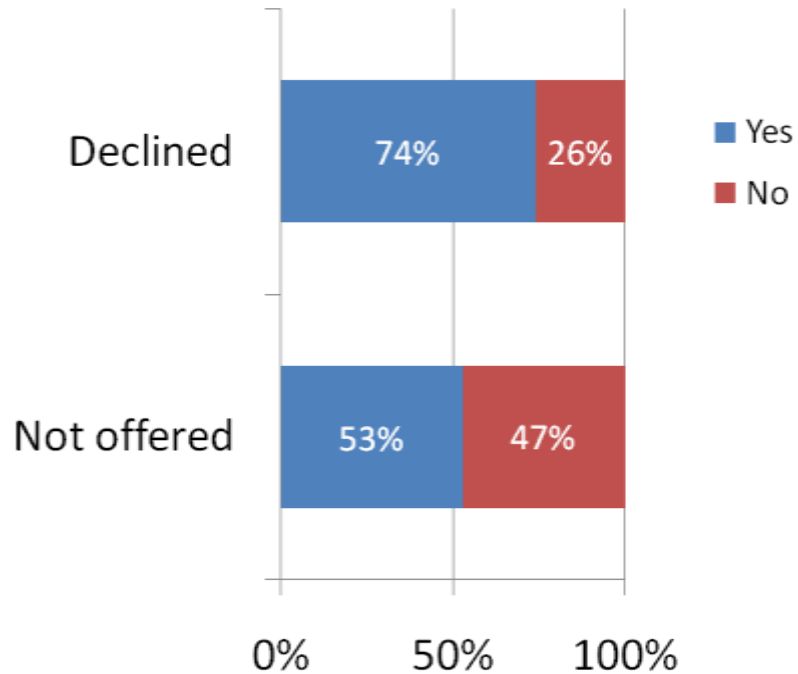
“We have nearly 70 reviews, 2 of which were bad and it’s always the bad ones that people refer to”

*Q7: Please tell us about the feedback you have received*

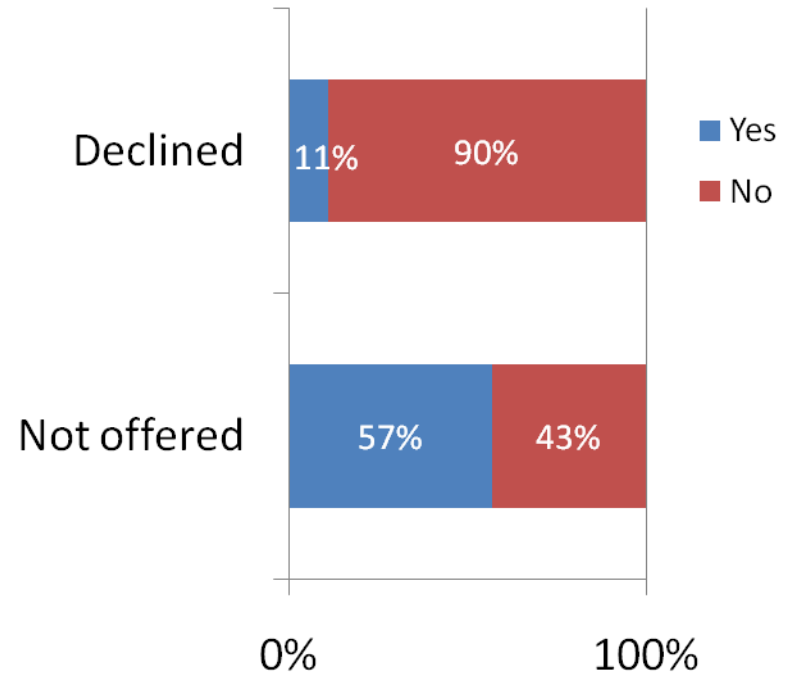
*Base: With widget and received feedback (48)*

# Potential of future new recruits to widget

Is your business featured on the Tripadvisor website?



Are you interested in having the widget?



Q8: Does your business currently feature on the Tripadvisor website?

Q9: Would you be interested in having Tripadvisor reviews on your listing on VisitScotland.com?

Base: Not offered widget (220)



# Why interested in reviews

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“Most people looking online for accommodation like to see reviews before making a choice”

“I have a very good ranking with them, this may sway folks to choose me over others”

“Makes it a one stop visit for would-be bookers by just having to go to VisitScotland’s website”

“I get such great comments from my guests and some have said I should go on Tripadvisor”

“If local businesses are receiving Tripadvisor reviews and customers are taking notice of their reviews, it would be bad policy not to have the option available for our business as no review may be wrongly perceived as a bad review”

“VisitScotland does not have a review facility on their website”

Q11: Why would you be interested in having Tripadvisor reviews on your listing on VisitScotland.com?

Base: Not offered widget & interested (114)



# Why not interested in widget

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“Too concerned about inaccuracies recorded in the reviews, particularly as I have been asking Tripadvisor to correct our location for nearly 4 years and they have not done so”

“Guests inclined to register negative comments more than positive”

“Knowing VisitScotland it would probably cost even more money!”

“Organisations like Tripadvisor have their place in the market, but should not be legitimised by having official recognition”

“It is so easy to manipulate your popularity on Tripadvisor [...] we thought the whole point of a meaningful review was that it should be unsolicited. I can give you many examples of this practice”

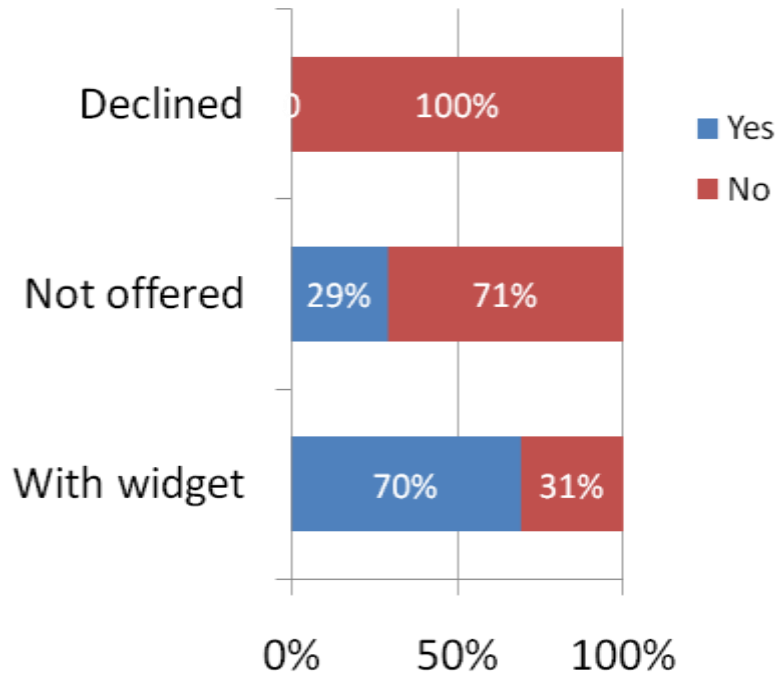
“Why does VisitScotland need Tripadvisor – why can't they get their own comment sheet going”

Q11: Why wouldn't you be interested in having Tripadvisor reviews on your listing on VisitScotland.com?

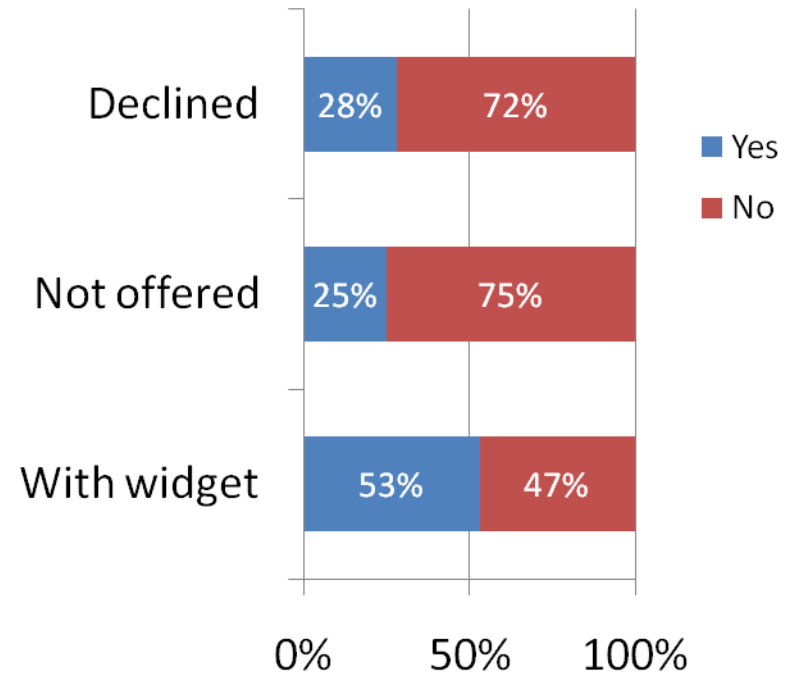
Base: Declined widget / not offered & not interested (16 / 79)

# Pro-activity when soliciting reviews

Do you feature a link to Tripadvisor reviews on your own website?



Do you actively encourage customers to write reviews?



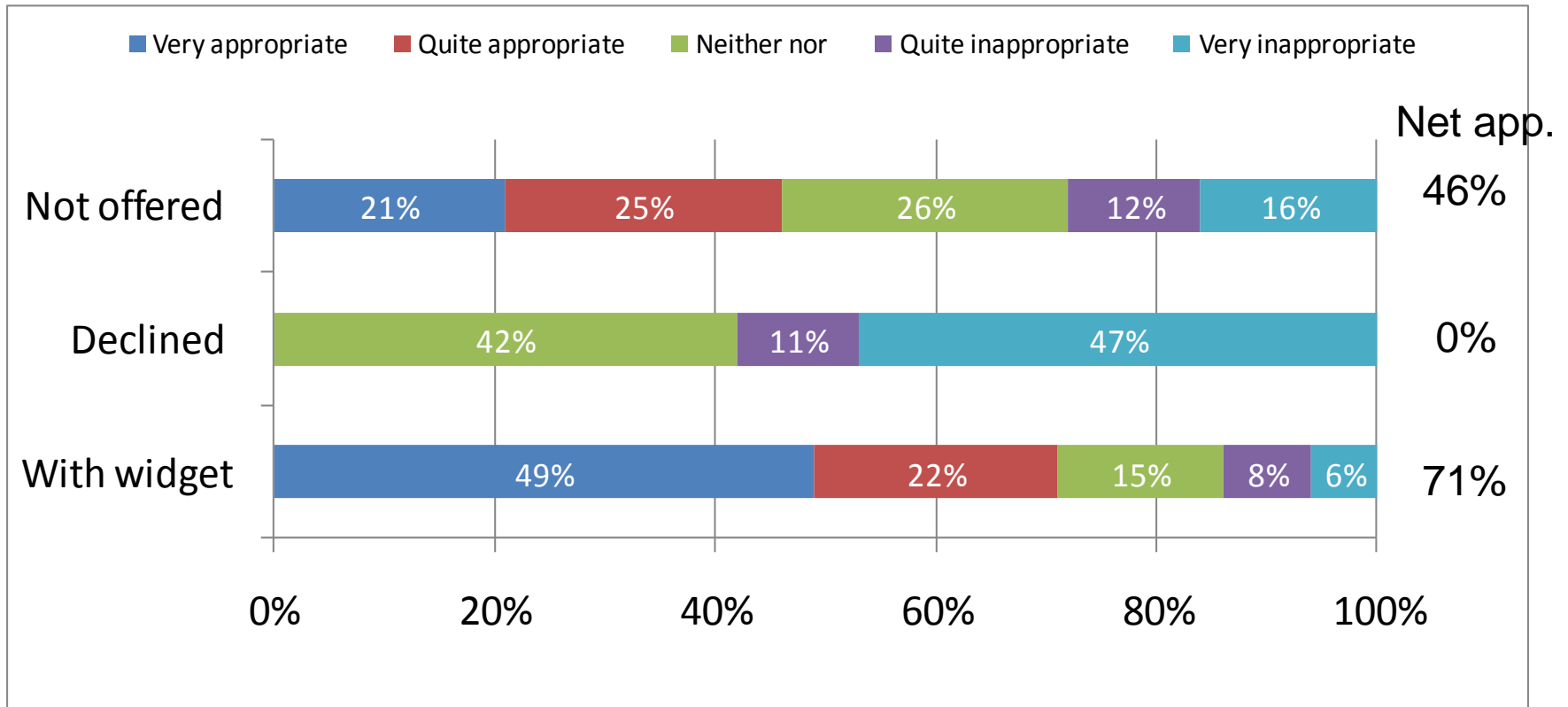
Q12: Do you feature a link to your Tripadvisor reviews on your accommodation / business website?

Q13: Do you actively encourage customers to write reviews of your accommodation on review sites such as Tripadvisor, Expedia etc.?

Base: With widget (131), Not offered widget (220)

# Appropriateness of Tripadvisor link

Opinions divided but majority in survey think it's appropriate



Q3: How appropriate do you think it is for VisitScotland.com to feature Tripadvisor reviews?

Base: With widget (133), Declined widget (19), Not offered widget (220)



# Why not appropriate?

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“Because it gives the impression you are favouring one business over another”

“Do it yourself and try to do it better”

“It would appear to the visitor that VisitScotland would be officially accepting the Tripadvisor views even though VisitScotland has no input to these views and will not have authenticated these views.”

“As there is no way to verify customer feedback, I strongly disagree with it being associated with a listing that I pay for”

“If people want Tripadvisor they should go to Tripadvisor”

“If the VisitScotland grading system is working well, why would customers need to use Tripadvisor as well?”

Q15: Why do you consider it inappropriate for VisitScotland.com to feature Tripadvisor reviews?

Base: All who think widget is not appropriate (with widget 19; not offered widget 59; declined widget 10)

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# Conclusions

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- Consumers are positive about UGC . They are comfortable with it and the majority use it.
- Tripadvisor is the number 1 site in the marketplace so VisitScotland.com is associated with a well-established, well-known brand
- VisitScotland.com's association is seen as appropriate both amongst those who have noticed the listings on VS.com as well as those who haven't
- Although awareness of the TA listings is relatively low (19%), we can assume these figures will grow.
- Tripadvisor listings are not seen as a replacement to star gradings, more as an additional information source
- Users of UGC content are aware of its limitations and the need for context and a 'pinch of salt'. On the whole reviews are useful and the overall influence of Tripadvisor on planning and booking holidays is huge
- Majority of business customers recognise Tripadvisor's influence and importance (if only as "necessary evil")

# Recommendations

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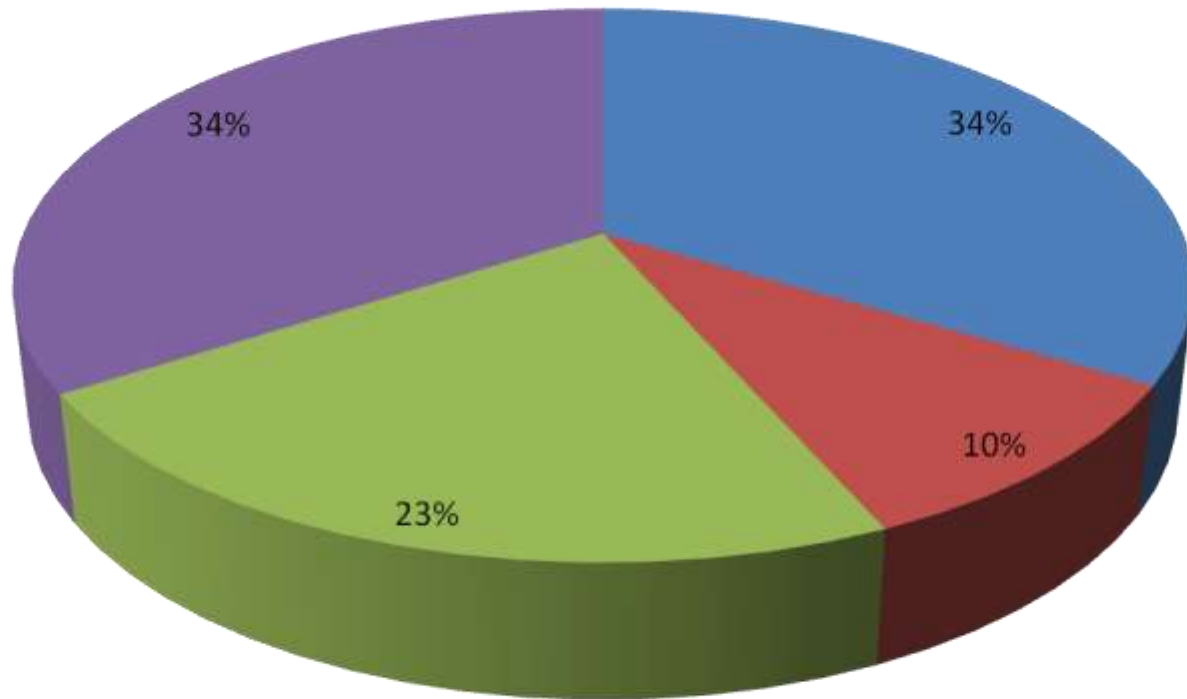
- Continue with the project (and “opting out” approach) and increase widget availability
- Monitor feedback from consumers and businesses
- Communicate research findings to businesses:
  - Consumer feedback & trends for customer review which affects all business sectors
  - Address key issues raised by businesses in survey & explain VisitScotland’s position
- Provide information/advice to businesses on how to maximise feedback / how to deal with Tripadvisor
- Repeat research in future



# Appendix

# How many times have you used the VisitScotland.com website?

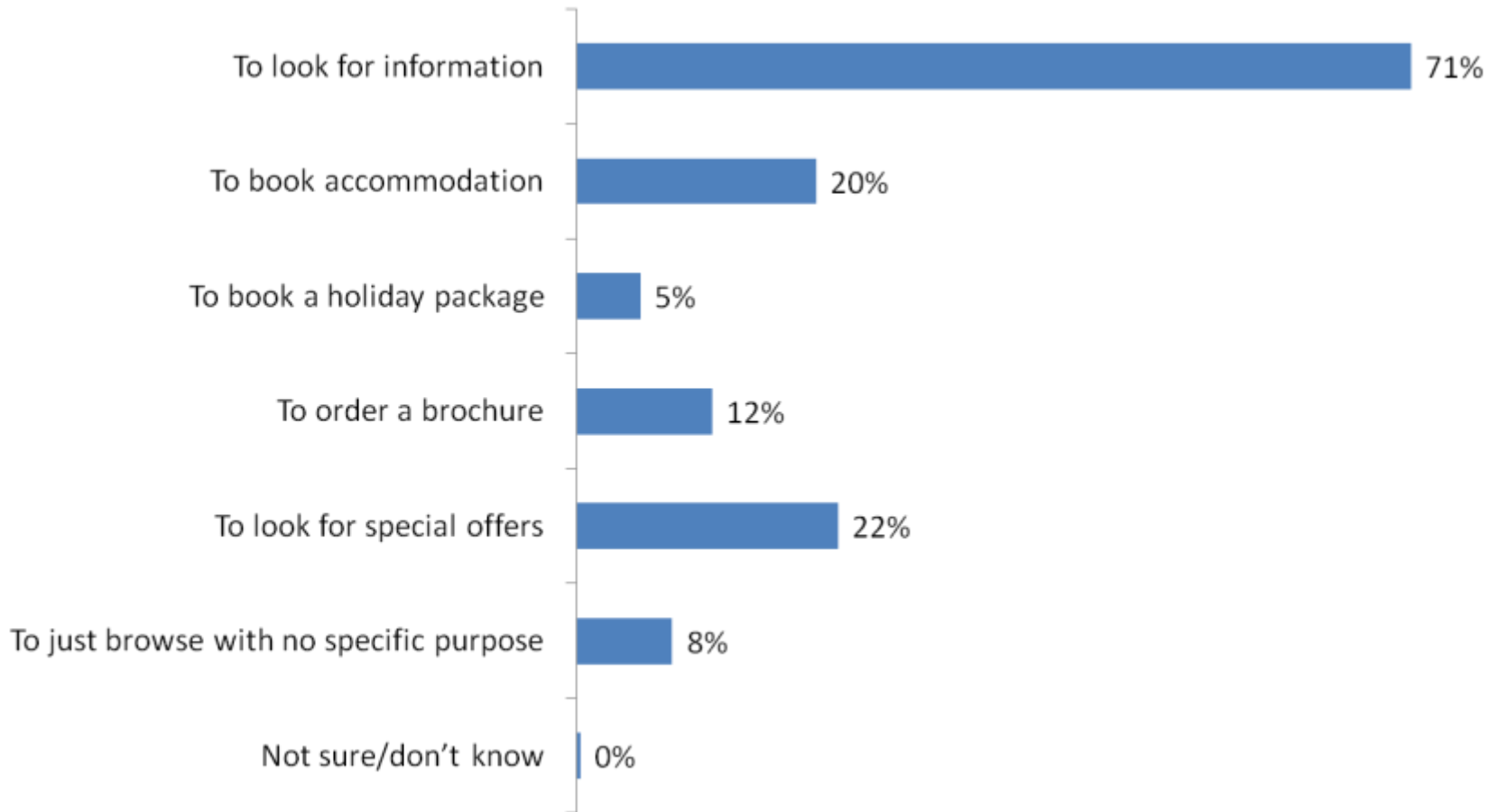
A good mix of first time visitors as well as more established users



■ This is my first visit   ■ Once before   ■ Less than 10 times   ■ More than 10 times

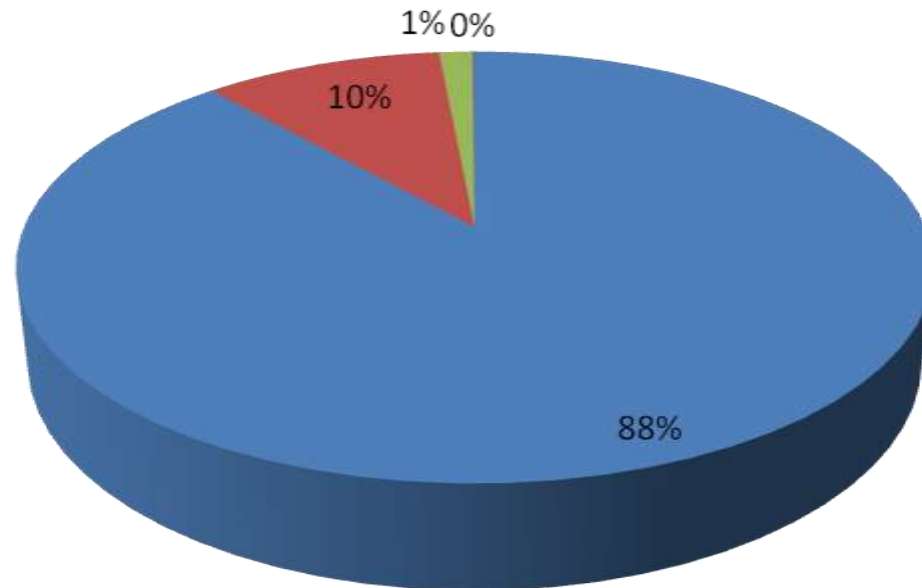
# Reasons for visiting VisitScotland today

Searching for information is the most popular reason for visiting VisitScotland.com



# Have you ever used the internet to book travel or accommodation?

The vast majority of respondents have used the internet to book travel or accommodation



- Yes, and will continue to do so
- No, but I would consider doing so in the future
- No, wouldn't consider
- No, wouldn't consider again although have used it in the past

# How many short breaks/holidays do you take per year (on average)?

Average number of short breaks/holidays per year = 3

