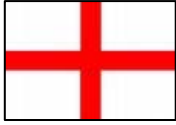


## English & Welsh Executive Summary



November 2007

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*Prepared For:*

**VisitScotland**

The Visitor Experience 2007

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## About the Research

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### Background & Objectives

The Visitor Experience study (previously called the Tourism Attitudes Survey) is an important tool in helping VisitScotland to understand:

- Motivations for visiting Scotland
- Holiday planning and booking behaviour
- Activities undertaken whilst in Scotland
- Perceptions of the Scottish holiday experience
- Overall satisfaction with the experience
- The factors that drive satisfaction
- Intentions regarding future visits and recommending Scotland to others as a holiday destination.

The study is intended to gather views and opinions from visitors to Scotland to gain an immediate picture and to supplement information received from other national surveys.

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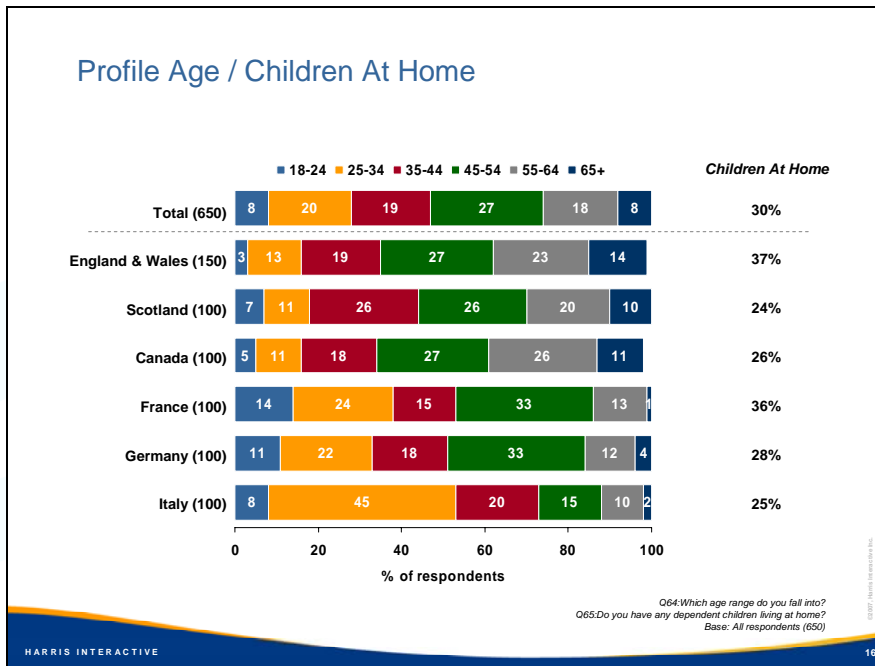
### Methodology

The research took place during July – September 2007. The focus of this survey was visitors from England & Wales, Scotland, Germany, France, Italy and Canada. The focus was also on the 'general' visitor, rather than visitors who were in large parties or guided tour groups (who by the nature of the groups, would not generally be captured as participants for this study). Information on the number of interviews achieved is contained in the full Executive Summary.

## Profile of English & Welsh Visitors to Scotland

Figure 1 shows the age profile of all visitors interviewed and provides an indication of lifestage by showing whether or not children are present at home. English & Welsh visitors tend to have an older age profile when compared with other countries interviewed.

**Figure 1**



The majority of English & Welsh respondents travel as a couple and a third bring children with them. Respondents are most likely to travel around Scotland independently rather than as part of a guided tour.

## Areas English & Welsh Visitors Visited During Their Holiday / Short Break in Scotland

English & Welsh respondents visited an average of 1-2 different regions during their recent visit to Scotland. This is the least number of areas visited, compared to all other countries interviewed.

The main areas visited by English & Welsh respondents include Edinburgh City (forty-one per cent), the Highlands & Skye (twenty-nine per cent) and Loch Lomond and the Trossachs (twenty per cent).

Ninety per cent of English & Welsh spend their whole holiday in Scotland and for over a half of English & Welsh visitors, their Scottish holiday is their main holiday of the year. Therefore, for four out of ten respondents, their trip to Scotland is an additional holiday to their main holiday.

Overall English & Welsh respondents spend an average of seven nights in Scotland, compared to over ten nights for other international countries interviewed.

## Travel Used to Get to Scotland

Using their own car (sixty-six per cent) is by far the most frequently used method of travel to Scotland by English & Welsh visitors.

Only seventeen per cent of English & Welsh respondents flew by plane. Of those English & Welsh visitors who flew, ninety-six per cent flew directly to Scotland from where they live. The most commonly used airlines by English & Welsh visitors are EasyJet, Flybe, BMI and British Airways.

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## Reasons for Choosing Scotland as a Holiday Destination

The main reasons for English & Welsh visitors choosing Scotland as a holiday destination are; the scenery, the number of things to see & do, the standard of accommodation and the standard of customer service.

The least important factors for English & Welsh visitors when choosing Scotland as a holiday destination include, Scotland being featured on film & TV, family connections they have in Scotland and the weather.

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## Environmental Issues / Concerns

Nearly four out of ten English & Welsh respondents feel their holiday decisions are affected by environmental concerns.

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## Modes of Transport Used Whilst In Scotland

Own car (fifty-eight per cent), public buses (thirty-one per cent) and train (twenty-seven per cent) are the most popular methods by which English & Welsh respondents travel around Scotland.

English & Welsh are more likely to use a Motorhome / caravan than other countries interviewed.

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## Accommodation

Hotels (twenty-six per cent), rented / self catering accommodations (twenty-six per cent) and bed & breakfasts / guesthouses (twenty per cent) are the main types of accommodation used by English & Welsh respondents.

In terms of expectations of customer service in their accommodation, ninety per cent of English & Welsh visitors' expectations are being met or exceeded.

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## Eating Out

The English & Welsh are the most likely of all countries interviewed to use cafés / tea shops (seventy-three per cent).

Good quality restaurants (sixty-four per cent) and pubs/ bars (fifty-seven per cent) are also popular types of eating establishments used by English & Welsh respondents.

When asked about their experiences of eating out, the English & Welsh respondents had the highest levels of agreement with the following statements;

- I felt I was valued as a customer (63%)
- The food was prepared with care and attention to detail (63%)
- I would recommend Scotland based on my recent food experience (60%)
- The waiting staff ensured I was happy with the service (59%)

English & Welsh respondents had highest levels of disagreement with the following statements;

- Waiting staff recommended food from the menu (51%)
- I was informed about locally sourced food on the menu (35%)
- The waiting staff asked what I thought of the food (25%)
- I found a good selection of Scottish dishes (24%)

Four out of ten English & Welsh respondents expected to be served high quality food.

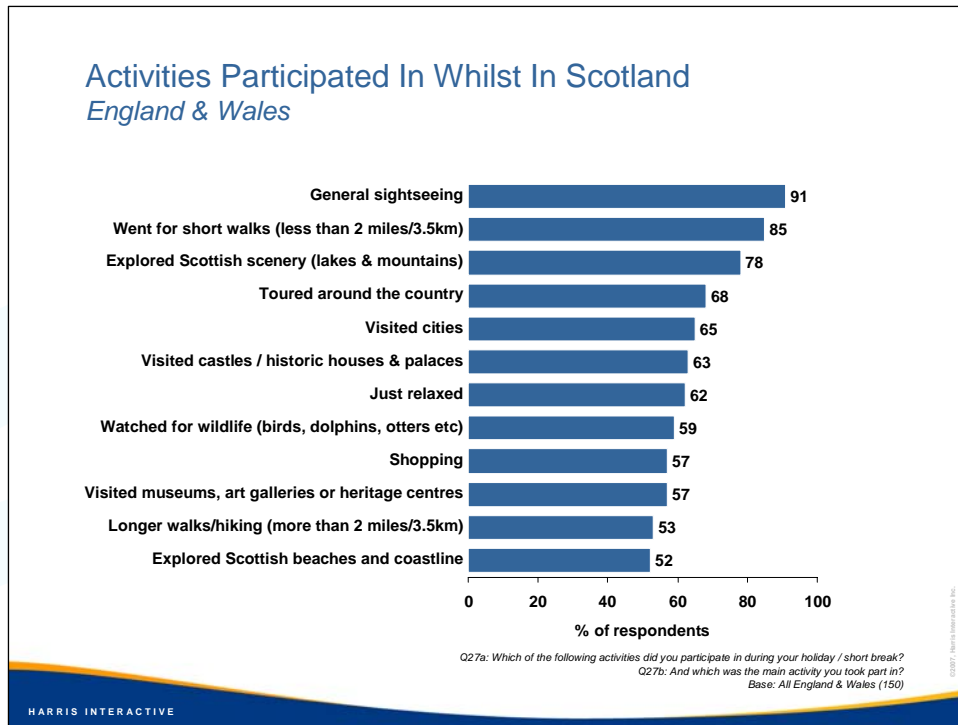
Overall, nine out of ten English & Welsh respondents felt the quality of food in Scotland met or exceeded their expectations. They are also the visitors most likely (along with the Scottish) to recommend Scotland based on their food experience.

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## Things to See & Do

Figure 2 shows visitors from England & Wales welcome the opportunity to participate in general sightseeing (ninety-one per cent), go for short walks (eighty-five per cent), explore Scottish scenery (seventy-eight per cent) and tour around the country (sixty-eight per cent).

**Figure 2**



They are also more likely to just relax (sixty-two per cent) than other countries interviewed.

## Things to Do in the Evening

Although “things to do in the evening” is one of the areas with which visitors express least satisfaction, the majority of English & Welsh visitors (eighty-seven per cent) think there is enough for them to see and do in the evenings.

English & Welsh visitors tend to spend their evenings eating out (seventy per cent), taking in the sights (sixty-three per cent) and eating / staying in accommodation (sixty-one per cent).

## Experience of Interacting With Local People and Perceptions of Customer Service

Ninety-seven per cent of English & Welsh visitors stated that the attitude of the local people met or exceeded their expectations. However, English & Welsh are most likely to have their expectations exceeded due to the fact that their expectations were low to begin with.

Nine out of ten English & Welsh visitors had their expectations concerning the attitude of local people in shops or restaurants met or exceeded.

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## Value for Money in Scotland

Eight out of ten English & Welsh visitors perceive Scotland to offer good value for money. Nine out of ten English & Welsh visitors had their expectations concerning value for money met or exceeded.

Of those English & Welsh that experienced poor value for money, it was mainly due to the accommodation (thirty-one per cent), general cost of living (nineteen per cent) and price of events and festivals (nineteen per cent).

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## General Overview

Ninety-eight per cent of English & Welsh respondents are satisfied overall with their recent holiday in Scotland and none are dissatisfied. Over a quarter of English & Welsh respondents also feel that their holiday was much better than expected.

Eight out of ten English & Welsh respondents had visited Scotland before.

Ninety-five per cent of the English & Welsh respondents are likely to holiday again in Scotland and a similar proportion would be likely to recommend Scotland as a holiday destination to others.

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## Holiday Planning & Booking

Over a third of English & Welsh visitors plan their holiday to Scotland between two to four months (thirty-five per cent) before departure. However, a quarter planned their trip in a month or under.

Nearly a half of English & Welsh respondents use the internet to help plan their holiday and four out of ten see this as their most useful source.

Of those who use the Internet, sixty-three per cent of English & Welsh visitors use sites like Tripadvisor.com to read reviews.

Nearly three-quarters of English & Welsh visitors use the Tourist Information Centre (TIC).

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The main reasons for using the TIC are to find information on local attractions / activities (forty-eight per cent), maps / guides (thirteen per cent) and bus times (thirteen per cent).

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## Highlights & Disappointments

The scenery and beautiful landscape (nineteen per cent) is the principal highlight of English & Welsh respondents' holiday in Scotland, followed by hiking and walking (seven per cent), the Edinburgh Tattoo festival (six per cent) and the mountains (five per cent).

The main disappointments for English & Welsh visitors are the weather (twenty-eight per cent), the accommodation (nine per cent) and the quality of food and restaurants (three per cent).

However, twenty-five per cent of all English & Welsh respondents feel as though there were no disappointments during their recent holiday to Scotland.

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For methodology & background information on the Visitor Experience study please refer to the Executive Summary

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