

Netherlands Executive Summary



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Prepared For:

VisitScotland

The Visitor Experience 2008

Introduction to the Visitor Experience Survey

The aim of this report is to provide a brief overview of visitors' experiences in Scotland during the summer of 2008. The study is intended to gather general views and opinions from a cross section of visitors in order to gain a snapshot of the Scottish tourism experience. The Survey supplements information available from other national surveys (e.g. UK Tourism Survey and International Passenger Survey). These surveys measure volume and value of tourism to Scotland and details can be found on www.visitscotland.org

Visitors were recruited whilst on holiday in Scotland and a comprehensive telephone interview was then conducted with visitors on their return home. The 2008 Visitor Experience survey focuses on visitors from the following countries:

- England and Wales
- Scotland
- USA
- Spain
- Netherlands
- Sweden

For more reports on the Visitor Experience Survey please go to www.visitscotland.org.

Sample Profile of Dutch Visitors Interviewed

A quarter (24%) of Dutch visitors interviewed came from South Holland, 18% were from North Brabant and a further 16% came from Gelderland. 11% were from North Holland and a similar proportion (10%) came from Overijssel.

Dutch visitors have the highest proportion of 45-54 year olds (36%) but the lowest proportion of those aged 65 or older compared to all other countries interviewed (2%).

Three quarters of Dutch visitors interviewed travelled as a couple and around a quarter brought children with them.

For further information on the profile of the Netherlands visitors to Scotland please refer to the "Tourism in Scotland" fact sheet on www.visitscotland.org

General Overview

Almost all (99%) of Dutch visitors are satisfied overall with their recent holiday in Scotland, with 78% indicating they were very satisfied. Also encouraging, 29% of Dutch visitors, felt that their holiday was much better than expected.

A third of Dutch visitors had visited Scotland before.

90% of Dutch visitors interviewed, are likely to holiday again in Scotland, with 53% mentioning that they would come in the summer. This indicates that Dutch visitors have an affiliation with Scotland that could be capitalised on. 90% would be likely to recommend Scotland as a holiday destination to others, although Dutch visitors are the least likely to recommend their recent holiday experience compared to other countries interviewed.

Reasons for Choosing Scotland as a Holiday Destination

The scenery remains the key pull factor for many visitors to Scotland, and this was the top reason cited by Dutch visitors. 74% felt that the scenery was a very important factor to them in their choice of Scotland.

Overall, the top five reasons for Dutch visitors choosing Scotland as a holiday destination are:

- the scenery (*74%)
- the nature and wildlife (*46%)
- the number of things to see & do (*40%)
- the opportunity to do outdoor activities (*35%)
- the history (*33%)

(* % of respondents who stated very important as a factor).

Like the Spanish, the Dutch visitors are more interested in the nature & wildlife and the culture & traditions than other nationalities interviewed.

Main Focus of Visit

As may be expected, this year's study reveals that touring is cited more by the international markets than the UK market as a main focus of the trip. Dutch visitors (38%) described the main focus of their recent holiday in Scotland as touring around the country, and over a quarter (27%) said they were on an activities based break. These are the highest proportions for both types of breaks compared to other countries interviewed.

In addition, 11% combined visiting city attractions with visiting surrounding countryside and the same proportion (11%) focussed mainly on city attractions.

Areas Dutch Visitors Visited During Their Holiday / Short Break in Scotland

Dutch visitors interviewed visited an average of four different regions during their recent visit to Scotland. This is the second highest number of areas visited (after Spain) out of all countries interviewed.

The main areas visited by Dutch visitors include Edinburgh City (83%), the Highlands & Skye (78%), Loch Lomond and the Trossachs (55%), Argyll & the Isles (39%) and Glasgow City (36%).

For the majority of Dutch visitors interviewed (83%), their visit to Scotland was their main holiday, rather than an additional holiday. Dutch visitors were also more likely than other markets to state that they spent their entire holiday in Scotland.

Dutch visitors spent the longest amount of time in Scotland out of all the countries interviewed. On average, Dutch visitors spent fourteen nights in Scotland, compared to the average of eleven nights for international visitors. This may be because Dutch respondents were more likely to tour around the country.

Modes of Transport used whilst in Scotland

With the exception of the Scottish, Dutch visitors were the most likely out of all other countries interviewed, to use their own car during their recent holiday in Scotland.

Own car (53%), public buses (39%) and train (30%) are the most popular methods by which Dutch visitors travel around Scotland.

Accommodation

Dutch visitors are much more likely to camp than any other country interviewed (26%). The other types of accommodation used by Dutch visitors include hotels (21%), bed & breakfasts/guest houses (19%) and self catering accommodation (17%). Hostels were also more popular with the Dutch (9%) than other countries interviewed, with the exception of the Spanish (11%).

In terms of expectations of customer service in their accommodation, 91% of Dutch visitors' expectations are being met or exceeded – over a quarter (28%) found customer service better than expected. However, Dutch visitors have the lowest expectations of customer service, probably as a result of the type of accommodation they stay in. Over half (53%) expected ok but not very welcoming service.

Dutch visitors on average gave the lowest scores for quality and value for money of accommodation (3.9 out of 5 for quality and 3.6 out of 5 for value for money).

Eating Out

Seven out of ten Dutch visitors (71%) used pubs/bars and 59% used budget restaurants. Half of the Dutch visitors went to good quality restaurants, with hotels (34%) and cafes/tea shops (33%) also being used.

Almost three quarters of Dutch visitors (72%) are interested in the local cuisine when choosing a holiday destination.

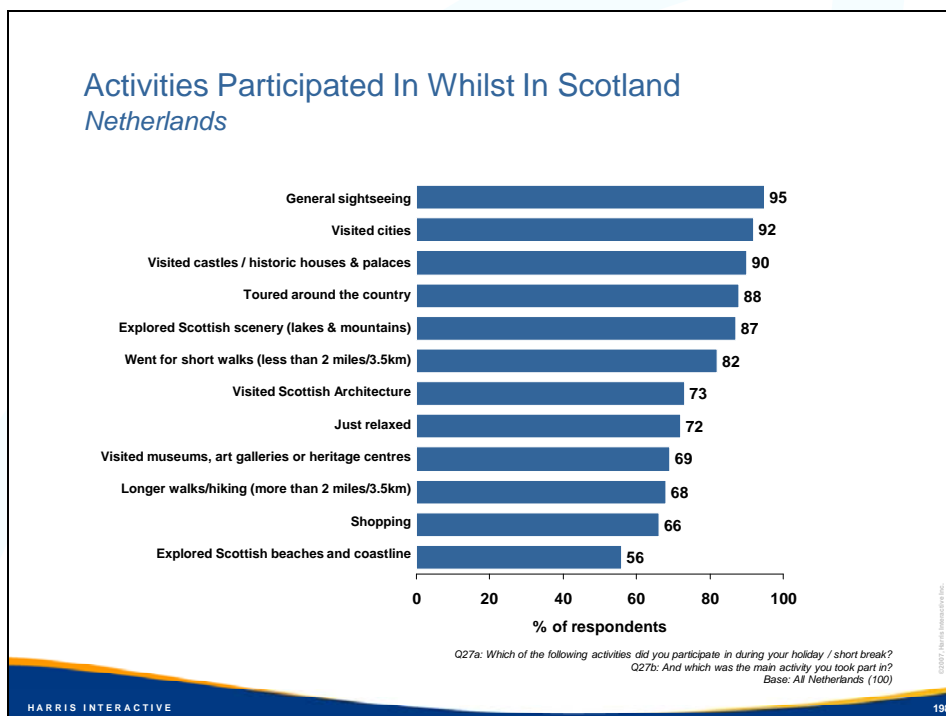
Nine out of ten Dutch visitors felt the quality of food in Scotland met or exceeded their expectations.

Things to See & Do

Figure 2 indicates that visitors from the Netherlands welcome the opportunity to participate in general sightseeing (95%), visiting cities (92%), visiting castles/historic houses & palaces (90%) and touring the country (88%).

Dutch visitors are the most likely to go for longer walks as a main activity than all of the other countries interviewed.

Figure 2



Things to do in the Evening

The majority of Dutch visitors interviewed (90%) thought there was enough for them to see and do in the evenings.

Visitors from the Netherlands tend to spend their evenings eating out (77%), going to pubs/bars/nightclubs (60%) and taking in the sights (56%). They are the most likely out of all countries interviewed to spend an evening attending a local event/festival (27%). However, a large proportion of Dutch visitors also liked eating/staying in accommodation (59%).

Experience of Interacting with Local People and Perceptions of Customer Service

80% of Dutch visitors interviewed thought that their Scottish trip afforded opportunities to interact with the locals. 95% stated that the general attitude of the local people met their expectations. 91% had their expectations met or exceeded, concerning the attitude of local people in shops or restaurants.

Influences on Holiday Decisions: Environmental & Economic

Only 12% of Dutch visitors indicated that they were very concerned (2%) or concerned (10%) about the environmental impact on their trip to Scotland. Dutch visitors expressed the lowest concern out of all countries interviewed.

Furthermore, only 3% think that the economic situation in their own country would prevent them from going on holiday in 2009. This is a similar view held by other European countries.

* Please note the fieldwork was conducted during the summer of 2008 (ending September 2008) which was prior to the bank bail outs in the UK and recession hitting European countries. These factors may impact on UK & European visitors' views subsequently.

Value for Money in Scotland

56% of Dutch visitors interviewed expected Scotland to offer poor value for money, and 63% actually experienced good value for money. 94% of Dutch visitors also had their expectations concerning value for money met or exceeded.

37% of Dutch visitors experienced poor value for money and they felt it was mainly due to the cost of eating out (24%) and the generally expensive cost of living (24%).

Holiday Planning & Booking

Over half (58%) of Dutch visitors planned their holiday four months or less in advance.

70% of Dutch visitors use the internet to help plan their holiday and 45% thought it was their most useful source. Another popular source of information with the Dutch are travel guides and books - 42% of Dutch respondents used these when planning their holiday, the highest proportion among all countries interviewed.

Of those who use the Internet, nearly six in ten (58%) of Dutch visitors use sites like Tripadvisor.com to read reviews. Dutch visitors were the least likely to visit price comparison websites while planning their trip.

Highlights & Disappointments

The scenery and beautiful landscape (33%) is the principal highlight of Dutch visitors' holiday in Scotland, followed by hiking/walking (11%), the Ben Nevis cable car/Ben Nevis (8%) and visiting Edinburgh/Edinburgh Festival (7%).

Disappointments that were mentioned include accommodation, poor public transport and quality of food/restaurants. On a positive note, a third of Dutch visitors interviewed (33%) did not have any disappointments on their recent visit to Scotland.

For further information on the Visitor Experience Study 2008 please contact:

VisitScotland Research Team
Fiona Carruthers/Karen McGregor
research@visitscotland.com