

# AN EXECUTIVE SUMMARY

## Project Scottish Retail

# Background & Objectives

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## Background

- In 2002, shopping by tourists accounted for 15% of the total spend by visitors to Scotland from within the UK, and 26% by tourists from overseas
- Projected figures suggest that the impact of tourists on retail spend is likely to increase. To truly capitalise on the spending boom which is anticipated, Visit Scotland wish to conduct research upon how they can most effectively capitalise on tourism retail spend ...

## Business Objective

- To develop an effective cross-marketing campaign of retailing and tourism to capitalise on the expected growth in tourism spend in the next few years

## Research Objectives

- To identify the importance of the retail experience on the decision to visit
- To analyse the visitor retail experience throughout the duration of their stay
- To determine the estimated level of visitor spend throughout the holiday duration on retail items
- To determine total spend on 'Scottish' gifts
- To ascertain perceptions on the quality of the Scottish retail experience
- To establish the cities where retail is seen as particularly important
- To identify any changes which could be made to improve the retail experience in Scotland

# Method And Sample

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## Quantitative

- 552 x 15 minute interviews were conducted between 16 October and 8 November 2004
- All respondents were screened to ensure they were leisure tourists and were staying in Scotland for at least one night
- Interviewing was conducted in-street and in shopping mall locations in six Scottish cities;
  - Aberdeen 89 interviews
  - Dundee 55 interviews
  - Edinburgh 127 interviews
  - Glasgow 81 interviews
  - Inverness 96 interviews
  - Stirling 87 interviews
- All data has been weighted by city location to equal 92 interviews per location

## Qualitative

- 12 x 45 minute telephone depth interviews with respondents from quantitative stage;
  - Mix of gender/social grade/age (18-34/35-54/55+)
  - Mix of cities visited and at least half to have visited city for shopping purposes

## Conclusions And Recommendations

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Scotland has three key retail areas which are seen as particularly appealing, that Visit Scotland should consider promoting to help boost levels of retail tourism;

- Quality/warmth of customer service
- Mix of modern brands and independent retailers
- Combining shopping with history and culture of the city/area.

From a qualitative perspective, the interaction of these three strength areas potentially provide the basis of a unique retail experience in Scotland.

Staff are a real asset to the Scottish Tourism experience, and should be used to promote the city whenever possible – they are ambassadors of the Scottish retail offer!

There is currently a broad mix of visitors who come to Scotland, providing an opportunity to attract different groups through targeted campaigns and offering specific packages, for example with ‘Shopping and Entertainment Breaks’ or ‘Shopping and Historical Breaks’...

...and leading on from this, specific shopping routes could be planned to target the tourists to certain areas and shops eg male/female shopping routes, shops in historic settings etc.

Cross promotion of shopping facilities in different cities should also be considered to accommodate the many tourists who tour the country on their stay

Providing information promoting and supporting the shopping experience for each city was identified as a key opportunity. In particular, respondents emphasised the value of a fold-out map/booklet indicating the location of shops and raising awareness/identifying ‘how to find’ more unique/independent retailers. This could also provide guidance on where to eat/stay, finding deals/value for money and outline the different shopping routes mentioned above.

Visitors emphasised the importance of this information being easily accessible both before and during the trip..

- The information could be used to ‘sell’ the holiday as a destination in travel agents and tourist information points before the visit. Ideally, visitors planning a trip would also be able to phone for a ‘Local Shopping Experience Guide’ and look at the information online
- Guides would also be tactically placed around the city (eg hotel rooms/lobby’s, theatres/cinemas and city centre locations) so that they were easily and immediately accessible to visitors during their stay

All these promotional activities should help to challenge any pre-conceptions with particular cities and, importantly, raise the profile/awareness of more unique/Scottish independent retailers.

## Key Findings

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Scottish cities are currently attracting a broad range of demographic profiles, from a wide range of countries. Tourists tend to travel around to different cities during their stay in the country.

Shopping is a major reason why people choose to visit a city, however, there is definite scope to improve on this further. Scottish visitors are more likely to travel to a city for shopping purposes than UK or International tourists.

For some tourists, shopping is not a top of mind activity which they plan to take part in, but many will go shopping throughout the course of a trip.

Shopping is conducted in a broad spread of areas, although is focused on the high street and shopping malls. Consumers purchase a mix of traditional Scottish goods, and non-Scottish goods.

Visitors to a city are more likely to stay for shorter periods of time if shopping is an important part of the trip.

Whilst rating their holiday overall, tourists saw room for improvement in Scotland's sport/leisure facilities, arts, theatre and nightlife. The accommodation, scenery and people that Scotland offers came in for particular praise.

Overall ratings for shopping facilities are high, and many visitors rated it better than they had expected (particularly in Glasgow). When asked specifically about different aspects of the shopping experience, the following themes arose....

Positive areas of the Scottish retail experience include;

- The quality of service
- Clean and pleasant shopping malls
- Easy to get to shopping facilities
- The different sources of information to help locate shopping areas within cities
- Catering (Aberdeen, Glasgow and Edinburgh only)

Areas which did not rate so well include;

- Souvenir stores (Except Edinburgh)
- Food services (in Dundee, Inverness and Stirling)
- Information on the shopping area itself (ie the location of specific shops/maps)

Around three-quarters of respondents said that they would be likely to recommend and return to the city for shopping.