

Scotland Executive Summary



November 2007

Prepared For:

VisitScotland

The Visitor Experience 2007

About the Research

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.

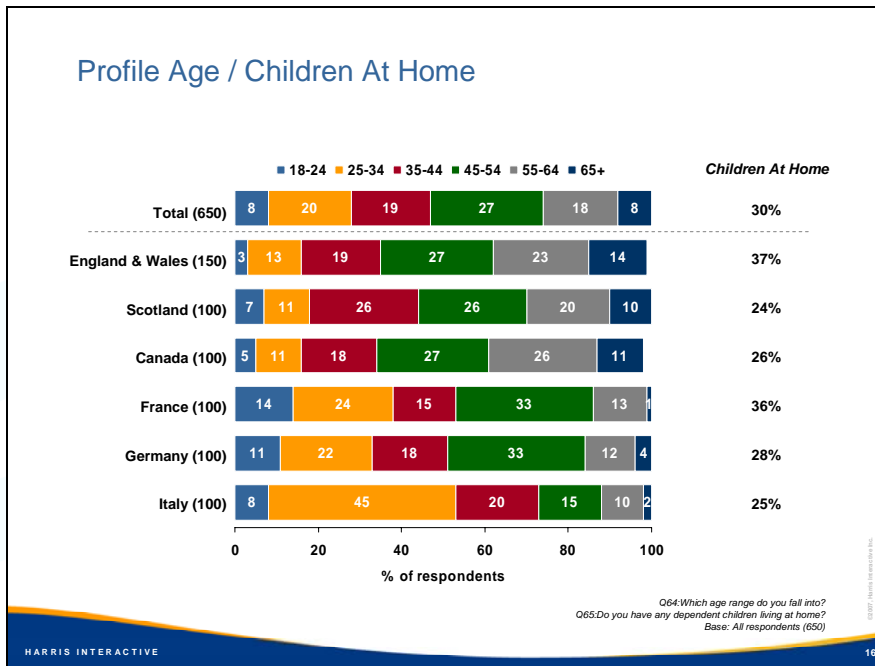
Methodology

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 Scottish 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. Scottish visitors tend to have an older age profile when compared to European countries interviewed, but is slightly younger than the age profile of Canadian and English & Welsh visitors.

Figure 1



The majority of Scottish respondents travel as a couple and just under a quarter bring children with them.

Respondents are most likely to travel around Scotland independently rather than as part of a guided tour.

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

Scottish respondents are the least likely of all countries interviewed to visit different areas. They visited an average of 1 region during their recent visit to Scotland.

The main areas visited by Scottish respondents include, the Highlands & Skye (thirty per cent), Edinburgh City (fifteen per cent), and Argyll & the Isles (thirteen per cent).

All Scottish respondents spent their whole holiday in Scotland. However, only a third states that their Scottish holiday is their main holiday of the year. Two-thirds of Scottish respondents have had another holiday, which is the highest proportion of all countries interviewed.

Overall Scottish respondents spend an average of six nights in Scotland, compared to over ten nights for other international countries interviewed.

Reasons for Choosing Scotland as a Holiday Destination

The main reasons for Scottish visitors choosing Scotland as a holiday destination are; the scenery, the quality of food when eating out, the number of things to see & do, the standard of accommodation and the standard of customer service.

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

Environmental Issues / Concerns

Just over a quarter of Scottish respondents (twenty-seven per cent) feel their holiday decisions are affected by environmental concerns.

Modes of Transport Used Whilst In Scotland

Own car (sixty-six per cent), train (twenty-three per cent) and public buses (twenty-two per cent) are the most popular methods by which Scottish respondents travel around Scotland.

Accommodation

Hotels (twenty-eight per cent), rented / self catering accommodations (twenty-one per cent) and bed & breakfasts / guesthouses (eighteen per cent) are the main types of accommodation used by Scottish respondents. They are also more likely to use caravans (fifteen per cent) than any other country interviewed.

Along with visitors from England & Wales they are most likely to give high scores for quality of accommodation (4.2 out of 5).

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

Eating Out

Good quality restaurants (sixty-six per cent), cafés / tea shops (sixty-four per cent) and pubs / bars (fifty-three per cent) are the most popular types of eating establishments used by Scottish respondents. Hotels are also a popular dining location (forty-nine per cent).

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

- I felt I was valued as a customer (65%)
 - I would recommend Scotland based on my recent food experience (64%)
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- The waiting staff ensured I was happy with the service (64%)
- The food was prepared with care and attention to detail (62%)

Scottish respondents had levels of disagreement with the following statements;

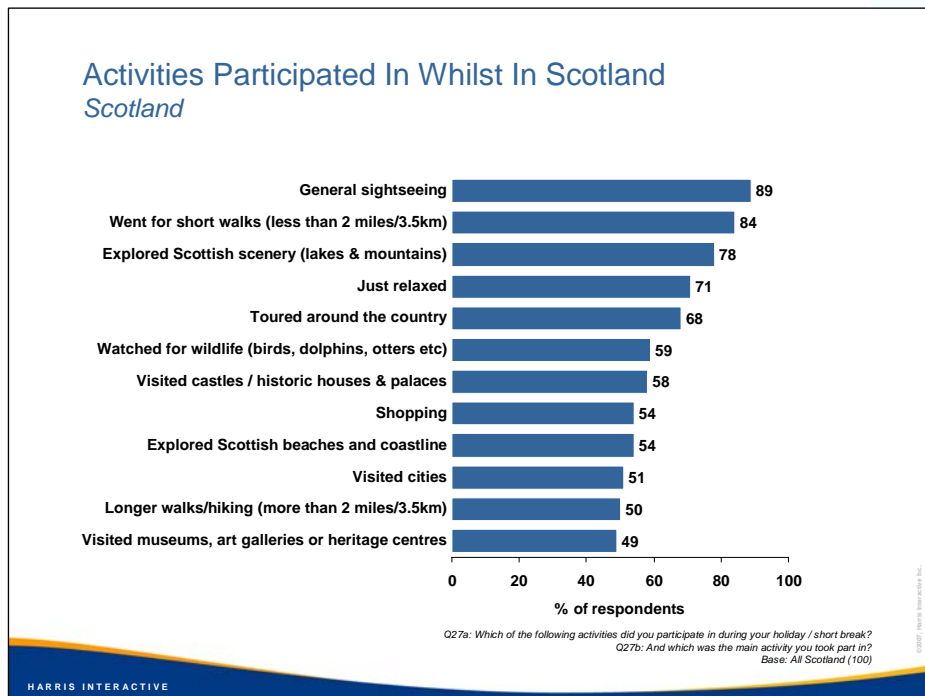
- The waiting staff recommended food from the menu (52%)
- I was informed about locally sourced food on the menu (35%)
- The waiting staff asked what I thought of the food (22%)
- My Scottish food experience was better than other destinations visited (20%)

Scottish respondents had the highest expectations of all countries interviewed, regarding the quality of food in Scotland. Overall, nine out of ten Scottish respondents felt the quality of food in Scotland met or exceeded their expectations.

Things to See & Do

Figure 2 shows that visitors from Scotland welcome the opportunity to participate in general sightseeing (eighty-nine per cent), go for short walks (eighty-four per cent), explore Scottish scenery (seventy-eight per cent) and just relax (seventy-one per cent). Scottish respondents are the most likely of all other countries interviewed to just relax during their holiday.

Figure 2



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 Scottish visitors (eighty-nine per cent) think there is enough for them to see and do in the evenings.

Scottish visitors tend to spend their evenings eating out (sixty-six per cent), taking in the sights (sixty-six per cent) and eating / staying in accommodation (fifty-two per cent).

Nearly a quarter of Scottish respondents attended a one off local event or festival.

Experience of Interacting With Local People and Perceptions of Customer Service

A quarter of Scottish respondents thought there would be little or no opportunity to meet and speak with local people.

Scottish respondents are most likely to expect the manner of local people to be friendly and helpful.

Ninety-eight per cent of Scottish visitors stated that the attitude of the local people met or exceeded their expectations.

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

Value for Money in Scotland

Eight out of ten Scottish visitors perceive Scotland to offer good value for money. Nearly nine out of ten Scottish visitors had their expectations concerning value for money met or exceeded.

Of those Scottish respondents that experienced poor value for money, it was mainly due to eating out (twenty-nine per cent), the accommodation (twenty-four per cent) and general cost of living (eighteen per cent).;

General Overview

Ninety-five per cent of Scottish respondents are satisfied overall with their recent holiday in Scotland and none are dissatisfied.

Only nineteen per cent of Scottish respondents feel that their holiday was much better than expected. However, ninety-five per cent of Scottish respondents are likely to recommend Scotland as a holiday destination to others.

Holiday Planning & Booking

As can be expected, Scottish respondents require a lot less time to plan their holiday than all other countries interviewed. A third of Scottish respondents planned their holiday within a fortnight and very few took more than six months to plan their trip.

Four out of ten Scottish respondents use the internet to help plan their holiday and a similar proportion view this as their most useful source. The Scottish visitors are also more likely than other countries interviewed to rely on knowledge gathered from a previous visit when planning their holiday in Scotland.

Of those who use the Internet, seventy per cent of Scottish visitors use sites like Tripadvisor.com to read reviews. Scottish respondents are also more likely than other countries interviewed to surf the web for holiday offers (sixty-four per cent).

Scottish respondents were the least likely of all countries interviewed to use the Tourist Information Centre (sixty per cent).

Of those Scottish respondents that used TIC, the main reasons for using it are to find information on local attractions / activities (thirty-eight per cent), maps / guides (seventeen per cent) and accommodation (fifteen per cent).

Highlights & Disappointments

The scenery and beautiful landscape (twenty-seven per cent) is the principal highlight of Scottish respondents' holiday in Scotland, followed by seeing family and friends (six per cent), and hiking and walking (five per cent).

The chief disappointment for Scottish visitors is the weather (thirty-eight per cent). Scottish respondents were most likely out of all countries interviewed to be disappointed by the weather.

Other disappointments (at low levels) include, the accommodation (five per cent) and the quality of food and restaurants (five per cent) and going home (five per cent).

However, sixteen per cent of all Scottish respondents feel as though there were no disappointments during their recent holiday to Scotland.

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

For further information contact
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