

REPORT



Tourism Attitudes Survey 2005

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Created for:



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Introduction

About this Document

The Tourism Attitudes Survey was conducted between July and October 2005 to assess the attitudes of both domestic (UK including Scotland) and international (German, French, Swedish and Italian) visitors to Scotland. Visitors from these countries were recruited at key sites around Scotland whilst on their holiday, using face-to-face interviews. A sample of those recruited (over 650) took part in a follow-up telephone interview after they had returned home.

The main objective of the research was to understand visitor's expectations of their visit to Scotland and the extent to which these expectations were met.

The Tourism Attitudes Survey 2005 was commissioned by VisitScotland and conducted by Harris Interactive, an independent market research agency. This report is a series of executive summaries for each of the countries surveyed in the Tourism Attitudes Survey 2005.

Please note that a similar survey has been conducted in 2004, looking at the attitudes of visitors from the UK (including Scotland), USA, Canada, Spain and the Netherlands.

Executive Summaries

England & Wales

English and Welsh tourists covered a wide range of age groups but most commonly were aged from 35-54 (49%). Overwhelmingly, visitors from England and Wales travelled in a party of two (69%) and without children (77%). 31% of tourists from England and Wales had children at home.

The majority of visitors interviewed had visited Scotland before (72%). On this visit, most of them (89%) spent their whole holiday in Scotland, with an average of 7.3 days being spent away from home.

In terms of holiday planning and booking, 44% of English and Welsh visitors obtained information from the Internet and 16% booked their trip as a package.

When in Scotland, the greatest proportion of tourists from England and Wales say they have visited Edinburgh city and Lothians (40%), The Highlands and Skye (32%), Perthshire Angus & Dundee, and Fife, Angus & Dundee, and Fife (28%) and Loch Lomond and Trossachs (inc Stirling) (23%). Typically, these tourists visited on average 1.8 areas in Scotland and so can be considered to be quite targeted in the visiting patterns (compared with, for example, Italian visitors who averaged over four areas visited). In terms of places visited, those from England and Wales were less likely to visit the cities than continental European visitors. Indeed, amongst the many highlights identified, the most often cited was the scenery (26%).

In common with other nationalities of tourists, visitors from England and Wales show very high levels of satisfaction with their holiday (average rating 4.7 out of five with 80% saying they are very satisfied). This is in keeping with the fact that these visitors overwhelmingly had their expectations either met (36%) or exceeded (61%). Again, this is reinforced by the fact that 98% claimed they would be likely to return for a holiday in Scotland.

Amongst those who were not very satisfied, when asked what could have been done to improve their satisfaction, respondents cited two main things: accommodation (33%) and perhaps less helpfully, the weather (23%).

For English and Welsh visitors the key factors of importance in selecting Scotland as a holiday destination were the scenery, natural environment, the number of things to see and do, the attitude of local people and (specifically to England and Wales), the standard of customer service in shops, restaurants and the quality of food. For these visitors, sightseeing, relaxing and walking appear to be the key activities.

The most popular accommodation for the English and Welsh was B&B (23%) or hotels (21%). On both value for money and quality of accommodation, respondents from England and Wales rated Scotland highly (78% rated it excellent or very good quality, 68% rated it excellent or very good value for money).

68% of respondents said they were interested in the local cuisine when on holiday and 50% also said that they thought that Scotland had a distinctive cuisine. However, only 23% of respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, respondents mainly ate in cafes and teashops (63%), good quality restaurants (59%) and pubs/bars (57%). On average, respondents scored eating out as four out of five for both quality and service. Respondents from England and Wales appeared very happy with the eating experience: 61% rated the food as "high quality" and a further 33% considered it "acceptable".

The key gifts and souvenirs that visitors from England and Wales purchased were 'sweets/fudge' (38%), 'other food' (29%) and 'whisky' (28%).

English and Welsh tourists rated Scotland as good or very good value for money (86%) which was in line with their expectations.

France

In common with Germany and Italy, France has a younger profile of respondents, 58% are aged 18-44. 42% of French respondents have children at home. Half of respondents travel in a party of two (average party size is 2.6) and 68% of respondents do not have children with them. 63% were visiting Scotland for the first time.

Whilst the majority (65%) of French respondents were visiting Scotland for their whole holiday, a significant number (35%) were visiting as part of a longer holiday (usually to other parts of Britain). On average French visitors spend 11.7 nights away from home in Scotland.

69% of French visitors used the Internet to plan their holiday and almost half of all respondents used the VisitScotland website. Only 13% booked their trip as a complete package.

When in Scotland, French respondents visited many areas: 88% visited Edinburgh city and Lothians; 77% visited Highlands and Skye; 67% visited Loch Lomond and Trossachs (inc Stirling); 55% visited Glasgow and Clyde. Overall, French respondents visited an average of 4.3 regions on their trip.

In common with the other nationalities of tourists, visitors from France show very high levels of satisfaction with their holiday (average rating 4.6 out of five with 63% saying they are very satisfied). However, it is worth noting that whilst high, this is actually the lowest rating for any of the countries in this study. French respondents said they had their expectations either met (40%) or exceeded (47%) and 84% of those interviewed claimed to be likely to return for a holiday in Scotland.

One of the features of the survey that most sets apart the French (and Italian) visitors is that many of them feel that Scotland could be better value for money. Indeed, of those respondents who were not 'very satisfied' with value for money (37%), just over a third say that better value for money would be the top area for improvement.

For French respondents the main highlight was the scenery (35%) which was also their chief reason given for visiting Scotland (27%). Whilst 28% said that their main disappointment was 'nothing', 17% said that the 'cost in general' was their main disappointment. This further reinforces the view that some French visitors found Scotland a little expensive.

The key factors for French visitors were the scenery, natural environment, number of things to see and do, and the attitude of local people. These are the four key factors common to all nations: In addition, French

visitors also valued the opportunity to interact with local people (35% said that this was very important to them). For these visitors, sightseeing, relaxing and walking appear to be the key activities.

The most popular accommodation for respondents was B&B (36%), camping (16%) and hotels (11%). In terms of quality of accommodation, respondents from France rated Scotland highly. However, accommodation was less highly rated in terms of value for money, with only half rating it excellent or very good value for money.

62% of respondents said they were interested in the local cuisine at their holiday destination and 61% also said that they thought that Scotland had a distinctive cuisine. 35% of respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, respondents mainly ate in B&B guest houses (33%), budget restaurants (62%) and pubs/bars (26%). On average respondents scored eating out as 3.5 out of five for quality and 3.7 out of five for service. Overall, respondents from France appeared satisfied with the eating experience, although less happy than visitors from Great Britain. Minorities considered the food 'poor quality' (9%) and that there was 'little choice' of food (19%).

The key gifts and souvenirs that visitors from France took away with them were 'other food' (60%), 'sweets/fudge' (54%) and 'whisky' (48%).

French tourists' expectations of Scotland in terms of value for money were mixed and their actual experience also reflects this. 55% said that Scotland was either good or very good value for money, leaving almost half who view Scotland as not good value for money.

Germany

In common with Italy and France, Germany has a younger profile of respondents, 68% are aged 18-44. 27% of German respondents have children at home. 58% of respondents travel in a party of two (average party size is 2.5) and 80% of respondents do not have children with them. 69% of respondents were visiting Scotland for the first time.

The majority (83%) of German respondents were visiting Scotland for their whole holiday and spending on average 13.8 nights away from home in Scotland. This was the longest stay made out of all the nations surveyed.

74% of German visitors used the Internet as a source of information to help them plan their trip, but only 11% used the VisitScotland website. Also, only 7% of German visitors booked their trip as a complete package.

When in Scotland, German respondents visited many areas: 83% visited Edinburgh city and Lothians; 80% visited the Highlands and Skye; 56% visited Loch Lomond and Trossachs (inc Stirling); 42% visited Glasgow and Clyde. Overall, German respondents visited an average of four regions on their trip.

In common with the other nationalities of tourists, visitors from Germany show very high levels of satisfaction with their holiday (average rating 4.8 out of five with 80% saying they are very satisfied). German respondents said they had their expectations either met (40%) or exceeded (60%) and 96% of those interviewed claimed they would be likely to return for a holiday in Scotland.

In common with a number of the continental European visitors, the Germans felt that value for money was an issue in Scotland. Of all those German respondents who were not 'very satisfied' with their holiday (20%), a third said that better value for money would have improved their satisfaction with their holiday.

For German respondents the main highlight was the scenery (33%) which was also the chief reason given for visiting Scotland (57%). For German visitors, the importance of scenery and the natural environment was very high, and the German visitor is most likely of the nations surveyed to be interested in longer walks.

For German visitors the key factors of importance were the four key factors common to all nations: scenery, natural environment, number of things to see and do and the attitude of locals.

The most popular accommodation for German respondents was B&B (38%), camping (19%) and hostels (15%). On both value for money and quality of accommodation, respondents from Germany rated Scotland highly but less than some other countries for value (68% rated it excellent or very good for quality of accommodation, 55% rated it excellent or very good value for money).

62% of respondents said they were interested in the local cuisine at their holiday destination and 46% also said that they thought that Scotland had a distinctive cuisine. 27% of respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, German respondents mainly ate in pubs/bars (72%), budget restaurants (68%) and B&B/guest houses (56%). On average, respondents scored eating out as 3.6 out of five for quality and 3.7 out of five for service. Overall, respondents from Germany appeared satisfied with the eating experience, although the quality of food was deemed "acceptable" (65%) rather than "high" (27%) and a minority (7%) rated it poor quality.

The key gifts and souvenirs that visitors from Germany took away with them were 'sweets/fudge' (58%) and 'whisky' (50%).

51% of German respondents said that they considered Scotland offered value for money, but almost half (48%) considered it either quite poor or very poor value for money. This experience of Scotland, however, appears to be in line with expectations.

Italy

In common with Germany and France, Italy has a younger profile of respondents, 80% are aged 18-44. Only 16% of Italian respondents have children at home. Around 63% of respondents travel in a party of two (average party size is 2.5) and 82% of respondents do not have children with them. 76% were visiting Scotland for the first time.

The majority (81%) of Italian respondents were visiting Scotland for their whole holiday, spending on average 12.4 nights away from home in Scotland.

74% of Italian visitors used the Internet to plan their visit, and a quarter used the VisitScotland website. 23% of Italian visitors booked their trip as a complete package.

When in Scotland, Italian respondents visited the greatest number of areas of the nations surveyed: 92% visited Edinburgh city and Lothians; 72% visited Highlands and Skye; 71% Loch Lomond and Trossachs (inc Stirling); 64% visited Glasgow and Clyde. Overall, Italian respondents visited an average of 4.5 regions on their trip.

In common with the other nationalities of tourists, visitors from Italy show very high levels of satisfaction with their holiday (average rating 4.6 out of five with 69% saying they are very satisfied). Italian respondents said they had their expectations either met (35%) or exceeded (60%), and 87% of those interviewed said that they would be likely to return for a holiday in Scotland.

One of the features of the survey that most sets apart the Italian (and other continental Europeans) visitors is that many of them feel that Scotland could be better value for money. Indeed, of those respondents who were not 'very satisfied' (31% of the Italian sample), 32% say that better value for money would be the top area for improvement.

For Italian respondents the main highlight was the scenery (46%) which was also their chief reason given for visiting Scotland (56%). The main disappointment was 'nothing'.

For Italian visitors the key factors of importance were scenery, natural environment, number of things to see and do, and the attitude of locals. Again, these were the four key factors common to all nations: For the Italians, the key activity that they engaged in was sightseeing, and they also had a greater likelihood to visit museums, galleries and attend performances than Swedish, French, and German visitors.

The most popular accommodation for respondents was B&B (56%) and hotels (14%). In terms of quality, Italian visitors rated accommodation highly but rated it lowest of all countries in terms of value for money – 76% rated it excellent or very good for quality of accommodation, 43% rated it excellent or very good value for money.

46% of respondents said they were interested in the local cuisine at their holiday destination and the same proportion also said that they thought that Scotland had a distinctive cuisine. However, few (19%) respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, respondents mainly ate in budget restaurants (79%) and pubs/bars (80%). On average respondents scored eating out as 3.4 out of five for quality and 3.7 out of five for service. Overall, respondents from Italy (along with Swedish visitors) were the least happy with the eating experience: 13% rated the quality of food as “poor” and 23% thought there was “little choice” of food.

The key gifts and souvenirs that visitors from Italy purchased were, ‘sweets/fudge’ (51%) ‘Woollen goods’ (46%), ‘pictures’ (46%) and ‘whisky’ (43%).

Italian tourists’ expectations of Scotland in terms of value for money were mixed and their actual experience also reflects this. 60% said that Scotland was either good or very good value for money, leaving a large minority who see Scotland as not good value for money.

Sweden

The profile of Swedish respondents is most similar to that of the British with a slightly older emphasis; only 35% are aged 18-44. 20% of Swedish respondents have children at home. Half of the respondents travel in a party of two (average party size is 3.3) with many respondents (35%) being in groups of four or more. 95% of respondents do not have children with them. 71% were visiting Scotland for the first time.

The majority (90%) of Swedish respondents were visiting Scotland for their whole holiday, spending on average 6.7 nights away from home in Scotland. Again, this type of visiting duration is far more akin to the British than to the rest of continental Europe.

41% of Swedish visitors used the Internet to plan their trip and 38% used the VisitScotland website. Swedish visitors were also the highest users of packaged trips (39%).

When in Scotland, Swedish respondents showed the following pattern of visiting: 84% visited Edinburgh city and Lothians; 62% Highlands and Skye; 58% Glasgow and Clyde; 50% Loch Lomond and Trossachs (inc Stirling). Overall, Swedish respondents visited an average of 3.6 regions on their trip.

In common with the other nationalities of tourists, visitors from Sweden show very high levels of satisfaction with their holiday (average rating 4.8 out of five with 77% saying they are very satisfied). Swedish respondents said they had their expectations either met (44%) or exceeded (51%), and 88% of those interviewed claimed that they would be likely to return for a holiday in Scotland.

A proportion of Swedish visitors feel that Scotland could be better value for money. Indeed, of those respondents who were not 'very satisfied' (23% of the Swedish sample), 26% say that better value for money would be the top area for improvement.

For Swedish respondents the main highlight was the scenery (35%) which was also the chief reason given for visiting Scotland (51%). The main disappointment was again 'nothing' which was followed by 'accommodation' (10%).

For Swedish visitors, the key factors of importance to them were scenery, natural environment, number of things to see and do, and the attitude of locals. These were the four key factors common to all nations. In addition, Swedish visitors also said that ease of travel to the destination and ease of travelling around were all amongst their important decision making factors. Of note is that Swedish visitors are far more likely to visit pubs/bars and clubs as their main evening activity (67%) than the other nations surveyed.

The most popular accommodation for Swedish respondents was hotels (48%) making the Swedish quite different from the other nations surveyed in this respect, as all the other nations (except Scotland) preferred B&B/guest-houses. The Scottish preferred to stay in self-catered accommodation. In common with other nationalities, Swedish tourists rated accommodation more highly in terms of quality and value for money – 66% rated it excellent or very good for quality of accommodation, and 48% rated it excellent or very good for value for money.

80% of respondents said they were interested in the local cuisine at their holiday destination and 42% also said that they thought that Scotland had a distinctive cuisine. A sizeable number (32%) of respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, respondents mainly ate in hotels (69%) and pubs/bars (75%). On average respondents scored eating out as 3.4 out of five for quality and 3.7 out of five for service. Overall, respondents from Sweden had mixed view of the eating experience – 23% considered the food of “good quality” and 9% rated it “poor quality”. These visitors, however, were happy with the choice of food available.

Overwhelmingly, the key take home gift or souvenir for the Swedish is whisky (77%), with ‘sweets/fudge’ (43%) and ‘fashion/designer wear’ (34%) also being popular.

Swedish tourists’ expectations of Scotland in terms of value for money were very low and their actual experience also reflects this. Only 28% said that Scotland was either good or very good value for money, leaving a majority who see Scotland as expensive/poor value for money. The number of Swedish tourists who said that Scotland was either good or very good value for money was quite low compared to all the other nations surveyed (For example, the figures were 86% for the English/Welsh, and 83% for the Scottish).

Scotland

Scottish visitors tend to be slightly older, only 40% are aged 18-44. 41% of Scottish respondents have children at home. 63% of respondents travel in a party of two (average party size is 2.4). 58% of respondents did not have children with them. However, Scottish visitors were the most likely to be travelling with children.

The majority (96%) of Scottish respondents were visiting Scotland for their whole holiday, spending on average 7.8 nights away from home in Scotland.

A quarter of Scottish visitors used the Internet to plan their visit (21% used their previous visit/experience) and only 2% used the VisitScotland website. This was the lowest percentage for all countries surveyed. Also, 9% of Scottish visitors booked a complete package for their visit.

Along with other British visitors, Scottish respondents visited fewer areas than tourists from other nations and tended to visit slightly different places (notably Perthshire Angus & Dundee, and Fife Angus & Dundee, and Fife): 37% visited Perthshire Angus & Dundee, and Fife; 24% visited Highlands and Skye; 19% visited Edinburgh city and Lothians. Overall, Scottish respondents visited an average of 1.3 regions on their trip.

In common with the other nationalities, visitors from Scotland show very high levels of satisfaction with their holiday (average rating 4.7 out of five with 82% saying they are very satisfied). Scottish respondents said they had their expectations either met (41%) or exceeded (55%) and 98% of those interviewed said that they would be likely to return for a holiday in Scotland. This was one of the highest percentages for all countries surveyed, along with England/Wales where the figure was also 98%.

Like the other British visitors, value for money is not something that the Scottish visitors cite as a potential improvement. Indeed, of those respondents who were not 'very satisfied' (18% of the Scottish sample), 22% say that better accommodation would be the top area for improvement.

For Scottish respondents the main highlights of a visit to Scotland were the weather (19%) and the scenery (15%). Clearly, the weather created some polarized views since (excluding 'nothing') 15% of respondents cited this as the biggest reported reason for disappointment with their holiday.

For Scottish visitors the key factors of importance to them were the four key factors common to all nations: scenery, natural environment, number of things to see and do and the attitude of local people. In addition, Scottish visitors also said that ease of travel to the destination were amongst their important decision

making factors. In common with other British tourists, Scottish visitors are more likely to spend time sightseeing, relaxing and walking.

The most popular accommodation for respondents is self catering (22%) and B&B (17%). On both value for money and quality of accommodation, Scottish respondents rated Scotland well (77% stated excellent or very good for quality of accommodation, 71% excellent or very good for value for money).

75% of respondents said they were interested in the local cuisine at their holiday destination and 65% also said that they thought that Scotland had a distinctive cuisine. A sizeable number (29%) of respondents said that the local cuisine actually influenced their decision to come to Scotland. Overall, respondents mainly ate in good quality restaurants (77%), pubs/bars (56%) and cafes/teashops (56%). On average respondents scored eating out as four out of five for quality and service. Overall, respondents from Scotland appeared very happy with the eating experience: 56% rated the food quality as high and 70% considered there was a wide choice. Along with visitors from England & Wales, Scottish visitors were the most satisfied with the eating experience.

The Scottish visitor is most likely to buy 'sweets/fudge' (37%), 'local crafts' (28%), 'other food' (24%) and 'whisky' (20%) as gifts/souvenirs.

Scottish tourists' expectations of Scotland in terms of value for money were similar to other British tourists in that they generally felt that Scotland was good value for money. 83% said that Scotland was either good or very good value for money.
