

SCOTLAND VISITOR SURVEY 2023

MOTIVATIONS AND INSPIRATION (13 SLIDES)

Extract on film, TV and literature

April 2024

Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic.
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey.
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited.
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023.
- The sample comprises leisure overnight visitors only.
- The data is weighted to reflect the profile of visitors to Scotland and it's regions.

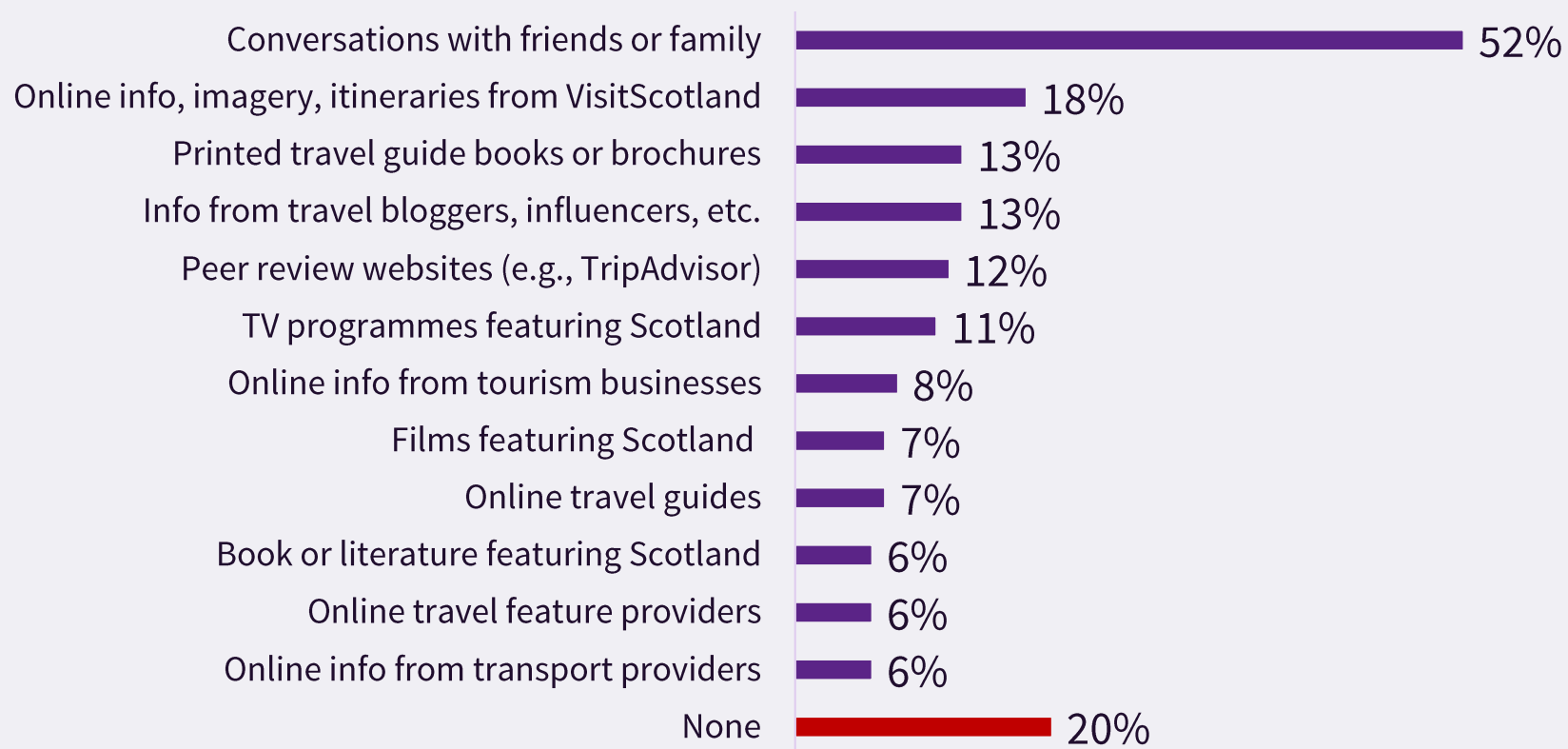


Sources of inspiration when deciding on Scotland

In this section we wanted to investigate four key categories of inspiration including:

1. Personal recommendations
2. Digital sources
3. Film, TV and literature featuring Scotland
4. Printed information

Personal recommendations was the most influential source of inspiration. Just less than one in five visitors mentioned VisitScotland online content. Film, TV or literature was also a source of inspiration to one in five visitors (net figure).

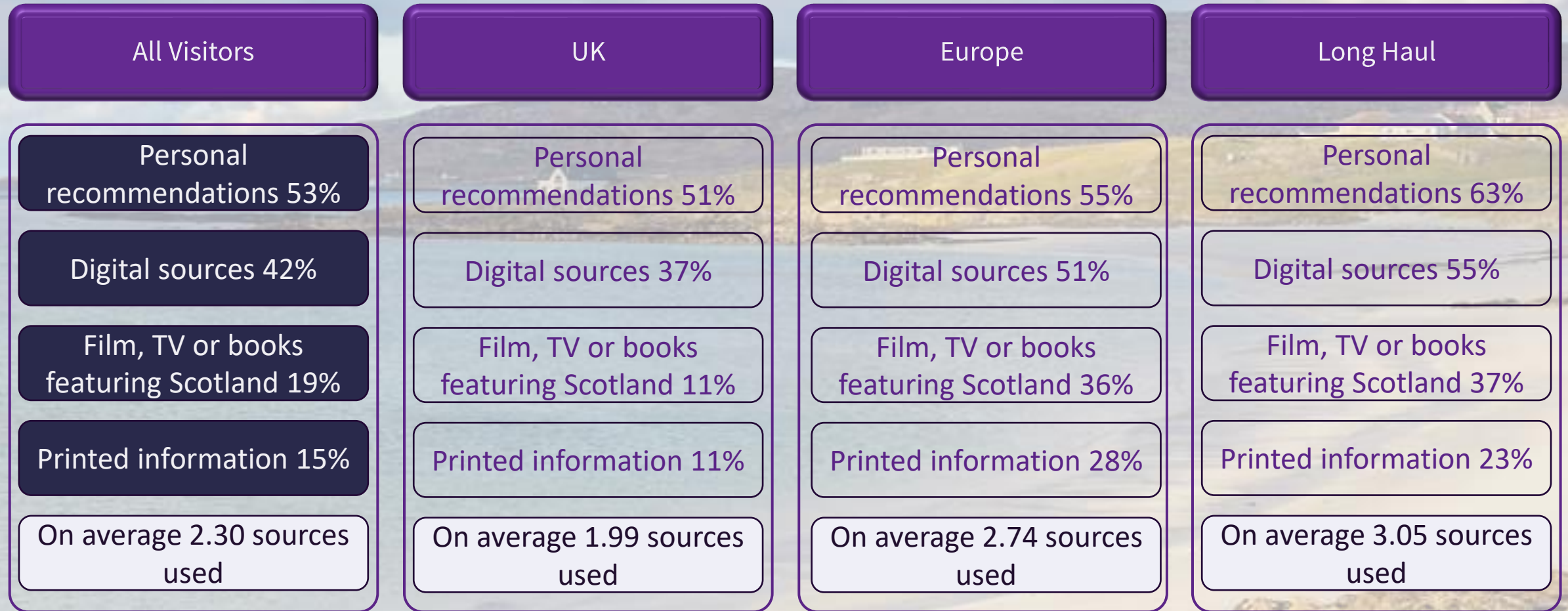


Q8 (Stage 2): Thinking back to the moment when you were considering your destination for this holiday or short break, which, if any, of these sources of inspiration helped you decide on Scotland?

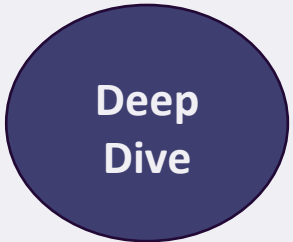
Base (all): 3,011

Sources of Inspiration when deciding on Scotland: net figures

A more detailed breakdown of the individual sources is available on the next slide



Sources of inspiration when deciding on Scotland: breakdown



Personal Recommendations	All Visitors	UK	Europe	Long haul
Conversations with friends and family	52%	50%	53%	59%
Advice from personal travel advisor or consultants	3%	2%	3%	8%

TV, film or books	All Visitors	UK	Europe	Long haul
Films featuring Scotland	7%	4%	19%	14%
TV featuring Scotland	11%	7%	18%	22%
Book or literature featuring Scotland	6%	3%	11%	15%

Printed information	All Visitors	UK	Europe	Long haul
Newspapers or magazines	5%	4%	9%	3%
Printed travel guide books or brochures	13%	8%	24%	22%

Sources of Inspiration when deciding on Scotland: life stage

Deep
Dive

Pre Nesters

1. Recommendations 71%
2. Digital sources 56%
3. Film, TV, literature 26%
4. Printed information 18%

Over index on:

- Conversations with family and friends 71%
- Info from travel bloggers, influencers 34%
- Peer review websites 22%
- Films 12%
- Online travel features 12%

Base: 338

Families

1. Recommendations 64%
2. Digital sources 45%
3. Film, TV, literature 18%
4. Printed information 11%

Over index on:

- Conversations with family and friends 63%
- Peer review websites 19%
- Films 11%
- Online travel features 7%

Base: 327

Older independents

1. Recommendations 54%
2. Digital sources 42%
3. Film, TV, literature 20%
4. Printed information 16%

Over index on:

- Older independents did not over-index on any source.

Base: 1,406

Retirement age

1. Recommendations 45%
2. Digital sources 37%
3. Film, TV, literature 16%
4. Printed information 16%

Over index on:

- Retirement aged visitors did not over-index on any source.

Base: 901

Sources of inspiration to choose Scotland: TV programmes

Just over one in ten of all visitors (11%) reported being inspired by a TV programme featuring Scotland, rising to 22% for long haul visitors.

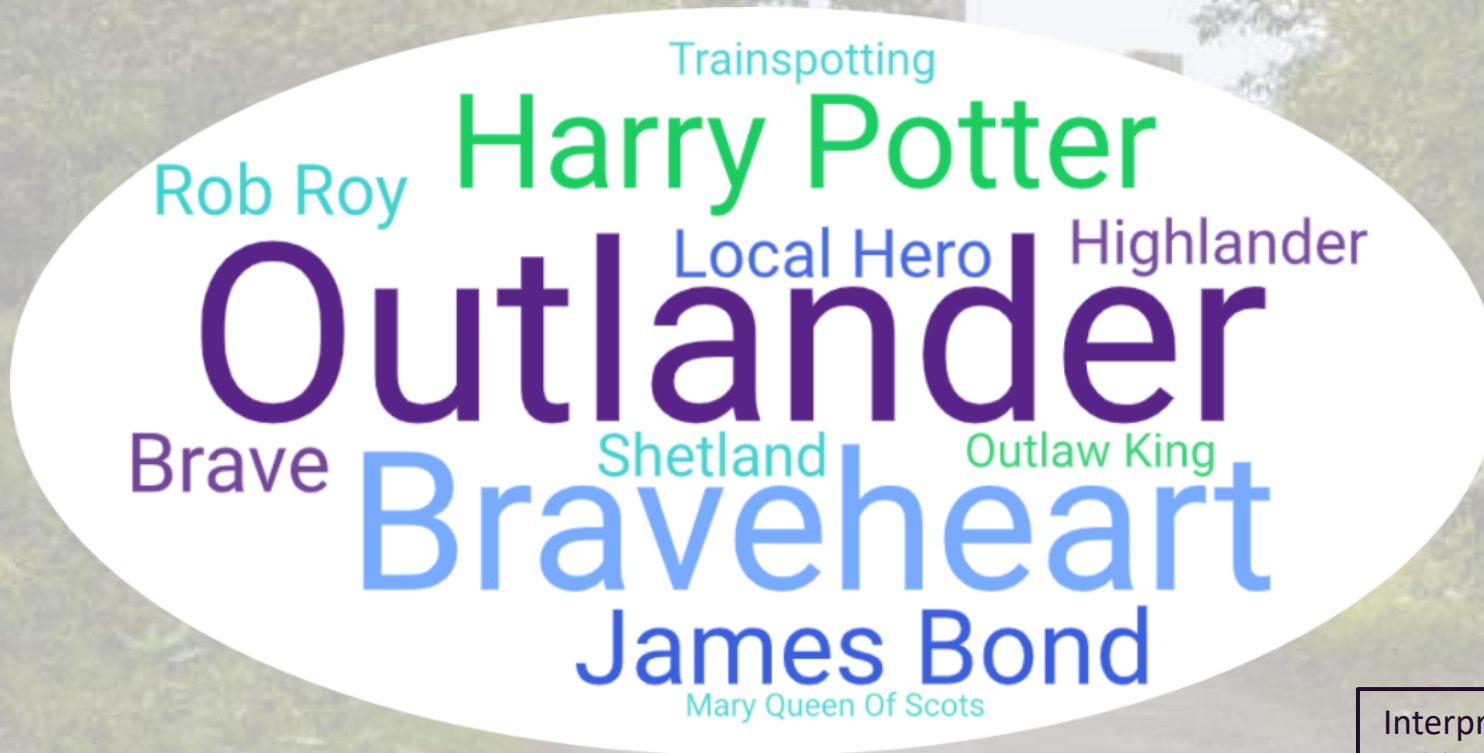


Including:	Responses
Outlander	175
Shetland	63
Men in Kilts	11
A train journey show	11
Rick Steves	9
Grand Tour series (Paul Murton)	9
Hamish MacBeth	8
Susan Calman	6
Hairy Bikers	5
Reign	3
Neil Oliver	3
Escape to the Country	3
Monarch of the Glen	3

Sources of inspiration to choose Scotland: films

Films were mentioned by 7% of all visitors as being inspirational to their visit to Scotland, rising to 19% for European visitors . Over 30 different films were cited showing a breadth of film influencing visitors and also a longevity beyond the release year of a film.

Outlander, Braveheart and Harry Potter were the most likely to be cited.

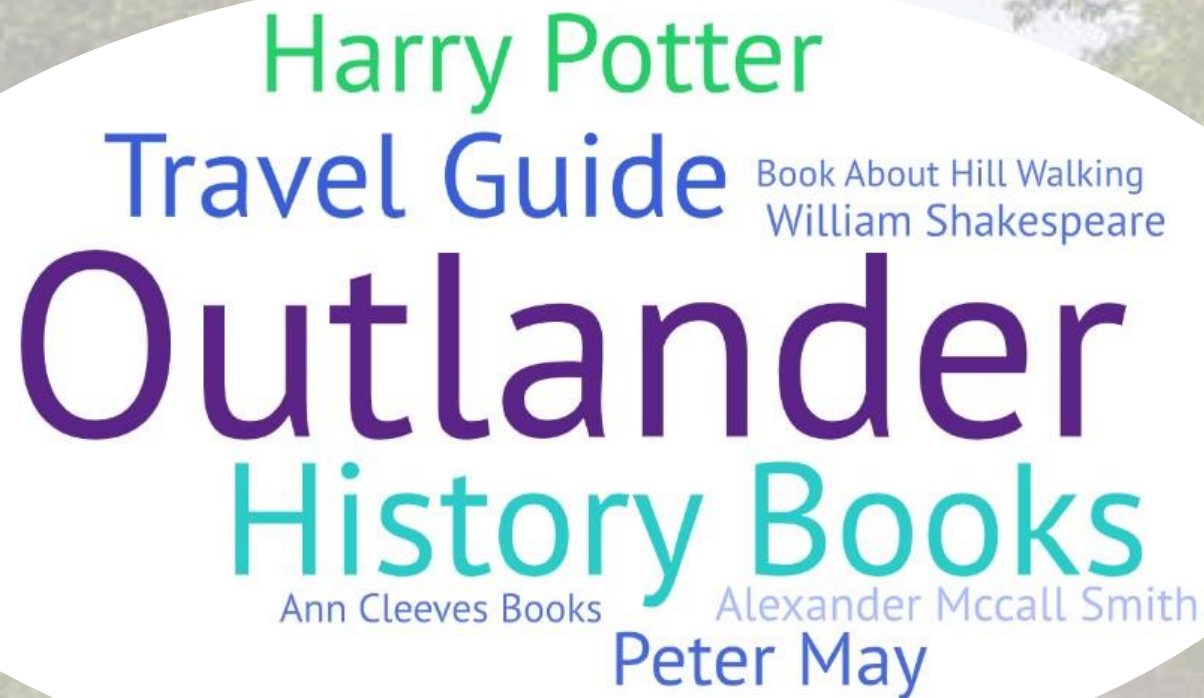


Including:	Responses
Outlander	58
Braveheart	56
Harry Potter	45
James Bond	18
Highlander	18
Local Hero	11
Rob Roy	8
Shetland	6
Outlaw King	6
Brave	4
Trainspotting	4
Mary Queen of Scots	4

Interpretation note: Outlander is a TV series but the above table reflects how respondents classified the programme, some referring to Outlander or Shetland as a film

Sources of inspiration to choose Scotland: books and literature

Books were cited by 6% of all visitors (rising to 15% for long haul visitors) as something that inspired their visit to Scotland. Those most likely to be mentioned were Outlander, history books, travel guides and Harry Potter. Over 20 different books or authors were cited, again showing a breadth of influence.



Including:	Responses
Outlander	57
History Books	27
Travel guide	15
Harry Potter	13
Peter May	6
Alexander McCall Smith	5
William Shakespeare	5
Ann Cleeve's books	4
Book about hill walking	4

Sources of inspiration: summary

The average number of sources of inspiration recalled is higher for overseas visitors. This may be linked to how much is invested in the trip and some having less familiarity with Scotland.

Print information is still in the mix as a source of inspiration (13%). European visitors are more likely to cite brochures and guidebooks (24%) than UK visitors (8%).

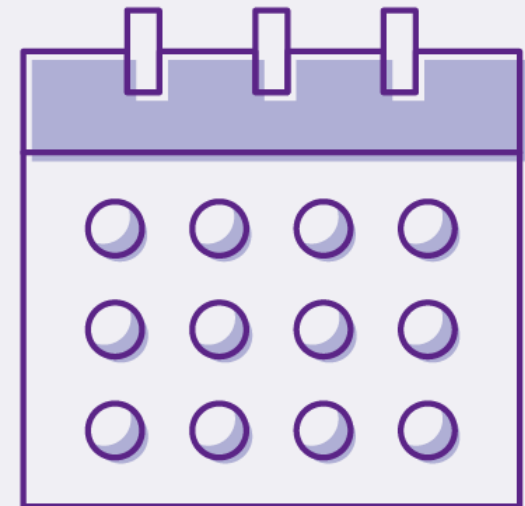
Film, TV or books featuring Scotland have a particular strong influence on our European (36%) and long haul visitors (Australasia, USA and Canada) (37%).

Film and TV programmes have a lasting influence as a source of inspiration, which often goes well beyond the 'release year' or premier. Often the TV and films mentioned are closely linked to our core assets with those showcasing Scotland's scenery and historical dramas dominating.



Definitions used within this report

- Within this report, **the term visitor is used to refer to respondents to the survey**. Data has been weighted to reflect the profile of visitors to Scotland and its regions using the national statistical monitors (Great Britain Tourism Survey and International Passenger Survey). More detail is available within a separate Background and Methodology report.
- **Within this report the following market definitions apply**
 - UK: respondents resident in Scotland or the rest of UK
 - Europe: respondents resident in Scotland's core markets of France, Germany, Spain, Italy, Netherlands and any other European country
 - Long haul: respondents resident in USA, Canada and Australasia
- **Within this report the following life stage definitions apply**
 - Pre nesters: respondents aged 16 to 34 with no children
 - Families: respondents aged 16 to 64 with children in the travel party
 - Older independents: respondents aged 35 to 64 with no children
 - Retirement age: respondents aged 65 and over





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