

SCOTLAND VISITOR SURVEY 2015 & 2016

Introduction

The Scotland Visitor Survey was carried out by Jump Research for VisitScotland to enhance understanding of visitor behaviour and the visitor experience in Scotland. 11,743 leisure overnight visitors were interviewed in Scotland between May and September 2015 and 2016. 2,999 responded to a follow-up online survey on their return home. **613** visitors were interviewed in Cairngorms National Park and **112** visitors answered specific questions about their visit to the area via the follow-up online survey.



Loch Insh, The Cairngorms National Park



What attracted visitors to come...

Cairngorms National Park (top 10)

Base	112
1 The scenery & landscape	71%
2 The range of activities available	50%
3 Holidayed here before and wanted to return	49%
4 To get away from it all	41%
5 The history & culture	31%
6 A place I have always wanted to visit	30%
7 It is easy to get to	26%
8 To visit a particular attraction	24%
9 Closeness to home	22%
10 Its reputation for friendly people	21%

Scotland (top 10)

Base	11743
1 The scenery & landscape	50%
2 The history & culture	33%
3 Holidayed here before and wanted to return	24%
4 To get away from it all	23%
5 To visit family / friends who live there	20%
6 It is easy to get to	16%
7 Closeness to home	15%
8 Its reputation for friendly people	15%
9 To visit cities	15%
10 A place I have always wanted to visit	15%

Similar to most other regions in Scotland, scenery and landscape was the top motivation for visiting Cairngorms National Park. Where this area differs to other regions however, is in the high proportion (50%) of visitors who mentioned the range of available activities as a key attraction. Interestingly, getting away from it all is also mentioned as a draw to the area, by two-fifths of visitors.

Previous experience and a desire to return was also important in driving visitors to the area with almost half having spent a holiday or short break in Cairngorms National Park previously.



Activities undertaken

Cairngorms National Park (top 10)

	Base	110
1	Sightseeing by car / coach / on foot	75%
2	Short walk, stroll	57%
3	Visited a woodland / forest area	55%
4	Long walk, hike, ramble	51%
5	Visited a historic house, stately home, castle	47%
6	Watched wildlife, bird watching	42%
7	Visited an aquarium, zoo, safari park, nature reserve	38%
8	Centre based walking	37%
9	Shopping	36%
10	Visited a country park / garden	36%

Scotland (top 10)

	Base	2999
1	Sightseeing by car / coach / on foot	74%
2	Visited a historic house, stately home, castle	60%
3	Short walk / stroll	54%
4	Shopping	46%
5	Visited a cathedral, church, abbey, other religious building	46%
6	Visited a museum / art gallery	45%
7	Centre based walking	45%
8	Visited a country park / garden	43%
9	Visited cities	42%
10	Long walk, hike, ramble	38%

Sightseeing was the most popular activity undertaken by three-quarters of visitors to Cairngorms National Park. Visitors to this area were more likely to mention each of the following outdoor activities than visitors in other areas: visiting woodland or forest areas, taking a long walk or hike, watching birds or wildlife and visiting an aquarium, zoo, safari park or nature reserve.

Short walks were also popular with more than half of visitors to Cairngorms National Park; and just under half mentioned visiting castles, historic houses or stately homes.



Type of accommodation stayed in

Cairngorms National Park (top 6)

	Base	112
1	Self-catering	35%
2	Hotel	26%
3	B&B / Guest House / Restaurant with Rooms	21%
4	Friends / family	15%
5	Hostel	10%
6	Camping	10%

Scotland (top 5)

	Base	2999
1	Hotel	41%
2	Self-catering	22%
3	B&B / Guest House / Restaurant with Rooms	20%
4	Friends / family	19%
5	Camping	6%

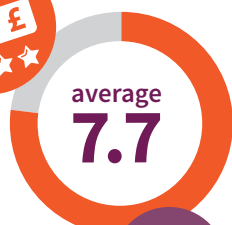
Self-catering accommodation was the top choice in Cairngorms National Park for 35% of visitors to the area. Serviced accommodation was also important with just over a quarter staying in hotels and 21% in B&Bs, guest houses or restaurants with rooms.

4% of visitors to the Cairngorms National Park stayed in their second home – a higher proportion than for most other areas in Scotland.

Visitors were asked to rate various aspects of their visitor experience in Cairngorms National Park on a scale of 1 to 10 (with 1 being extremely dissatisfied through to 10 as extremely satisfied).

Visitors to Cairngorms National Park gave high ratings across all aspects of the visitor experience. The ease of travelling around the National Park, value for money of attractions and knowledge of accommodation staff about things to see in the local area were particularly praised.

Value for money of accommodation and eating out received slightly lower scores; and visitors to the area were least satisfied with the availability of free Wi-Fi in their accommodation.

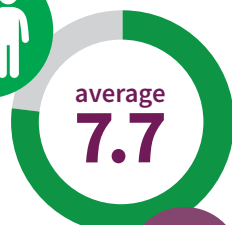


46%
scored 9 or 10
on the scale

Satisfaction with
value for money
of accommodation



Base - 102



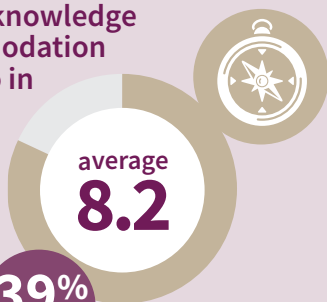
40%
scored 9 or 10
on the scale

Satisfaction with
service provided
by staff at
accommodation



Base - 102

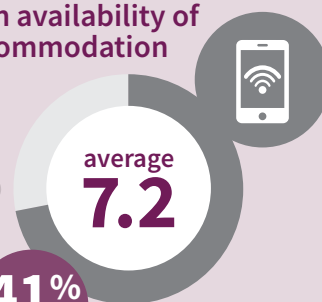
Satisfaction with knowledge
of staff at accommodation
about things to do in
the local area



39%
scored 9 or 10
on the scale

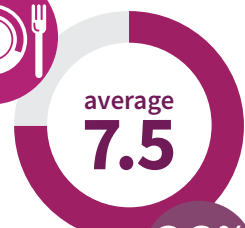
Base - 102

Satisfaction with availability of
free Wi-Fi at accommodation



41%
scored 9 or 10
on the scale

Base - 102



28%
scored 9 or 10
on the scale

Satisfaction with
value for money
of eating out



Base - 103



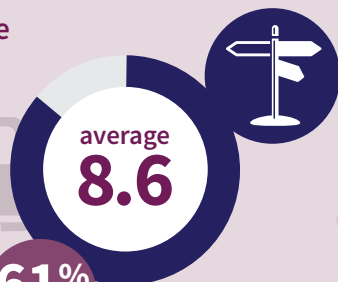
30%
scored 9 or 10
on the scale

Satisfaction with
the availability of
local produce
when eating out



Base - 103

Satisfaction with ease
of getting around

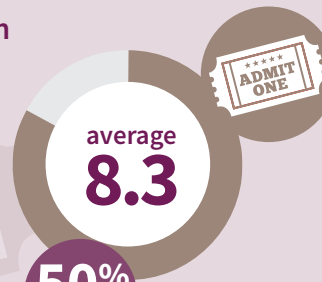


61%
scored 9 or 10
on the scale



Base - 112

Satisfaction with
value for money
of attractions



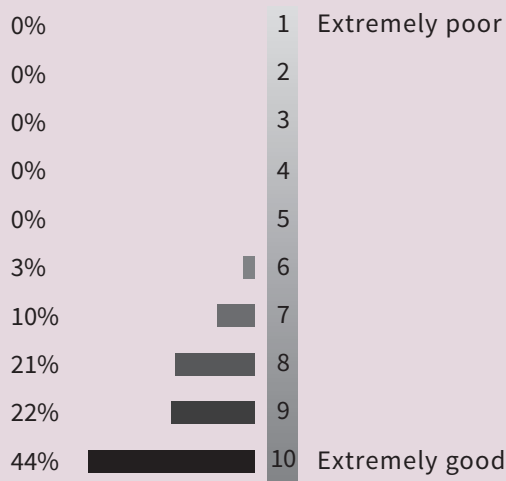
50%
scored 9 or 10
on the scale



Base - 110



Your overall experience?



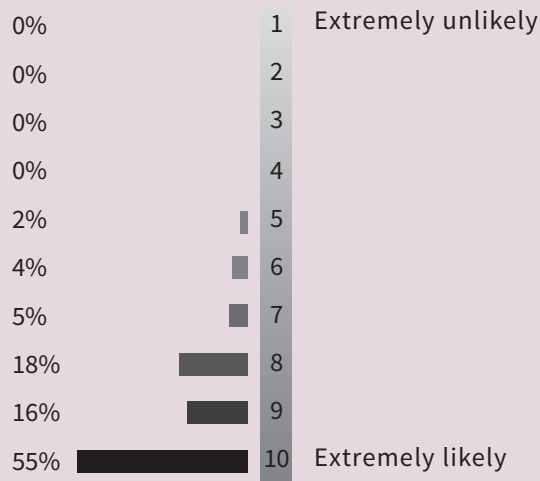
66%
scored 9 or 10
on the scale

average
8.9

Base - 112



How likely are you to recommend?



71%
scored 9 or 10
on the scale

average
9.1

Base - 112



Visitors to Cairngorms National Park were very satisfied with their experience with almost all (97%) giving satisfaction scores of 7 or more out of 10. Just under two-thirds of visitors scored 9 or 10 on the scale, indicating the highest level of satisfaction with their trip. These top 2 scores (9 or 10) show genuine satisfaction and can foster loyalty. The challenge is to continue to improve the visitor experience to encourage more visitors to award the highest scores on the satisfaction scale. Similarly high scores were recorded for likelihood to recommend Cairngorms National Park, with 94% of visitors to the area giving scores of 7-10. 71% scored at the 9 and 10 out of 10 level highlighting a strong propensity to recommend the area to family or friends.

Appendix Using and interpreting the Scotland Visitor Survey

- The Scotland Visitor Survey should not be viewed in isolation**
- The survey collates views on a wide range of topics to understand visitor attitudes and behaviours. This data supplements data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level by:
 - The Great Britain Tourism Survey (GBTS) which estimates the volume and value of domestic tourism - from within Scotland and the rest of Great Britain
 - The International Passenger Survey (IPS) which provides details of tourism from abroad
- For further information and notes on this data please see the Tourism in Scotland and Tourism in Scotland's Regions fact sheets available within the Research & Statistics section of our corporate website http://www.visitscotland.org/research_and_statistics.aspx
- The Scotland Visitor Survey is undertaken during the main season only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Scotland between May and September 2015 and 2016 only.
- The sample comprises leisure overnight visitors only, and as such the following are excluded: visitors on a day trip from home, those on a business trip, cruise ship visitors.
- The base size refers to the unweighted base.