

# 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. **701** visitors were interviewed in Lothians and **84** visitors answered specific questions about their visit to the area via the follow-up online survey.



The Bass Rock and Tantallon Castle, North Berwick, East Lothian

## Volume and Value

The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region. To provide this wider context and to provide an overview of tourism to the area, the following data is sourced from the 2015 GB Tourism Survey and International Passenger Survey (latest available at time of publication). These figures are for the full year Jan-Dec 2015:

### Lothians (2015)

**338,000** overnight visits

**86%** domestic visits

**14%** overseas visits

Top overseas markets: **USA, Germany, Canada, Spain, Netherlands**

**£78m** total visitor spend



## What attracted visitors to come...

### Lothians (top 10)

	Base	84
1	The scenery & landscape	60%
2	The history & culture	53%
3	To visit family / friends who live there	38%
4	A place I have always wanted to visit	33%
5	To visit cities	30%
6	To get away from it all	29%
7	Holidayed here before and wanted to return	26%
8	To visit a particular attraction	21%
9	The range of activities available	18%
10	It is easy to get to	14%

### 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%

Three-fifths of visitors to Lothians were attracted by the scenery and landscape whilst over half cited the history and culture of the area as a driver to visit. Visiting friends or family was a particularly important motivator for visitors to Lothians.

A third of visitors said they had always wanted to visit the area, whilst 30% mentioned visiting cities as a motivation to visit the Lothians, influenced by its close proximity to Edinburgh City.



## Activities undertaken

### Lothians (top 10)

	Base	84
1	Sightseeing by car / coach / on foot	75%
2	Visited a historic house, stately home, castle	73%
3	Visited cities	61%
4	Short walk, stroll	53%
5	Shopping	46%
6	Visited a beach	44%
7	Visited a cathedral, church, abbey, other religious building	44%
8	Visited a country park / garden	42%
9	Visited a museum / art gallery	42%
10	Visited a visitor / heritage centre	41%

### 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%

Three-quarters of visitors to the Lothians said they went sightseeing in the area either by car, coach or on foot. Almost as important was visiting a historic house, stately home or castle mentioned by 73% of visitors to Lothians.

44% said they had visited beaches and a similar proportion had been to country gardens or parks; whilst cathedrals, churches, abbeys and other religious buildings as well as museums and galleries and visitor / heritage centres were also mentioned by around two-fifths of Lothians visitors.

61% of visitors to Lothians mentioned visiting cities whilst staying in this area, and possibly linked to this just under half said they had been shopping.



## Type of accommodation stayed in

### Lothians (top 5)

	Base	84
1	Hotel	25%
2	B&B / Guest House / Restaurant with Rooms	24%
3	Self-catering	23%
4	Friends / family	21%
5	Camping	9%

### 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%

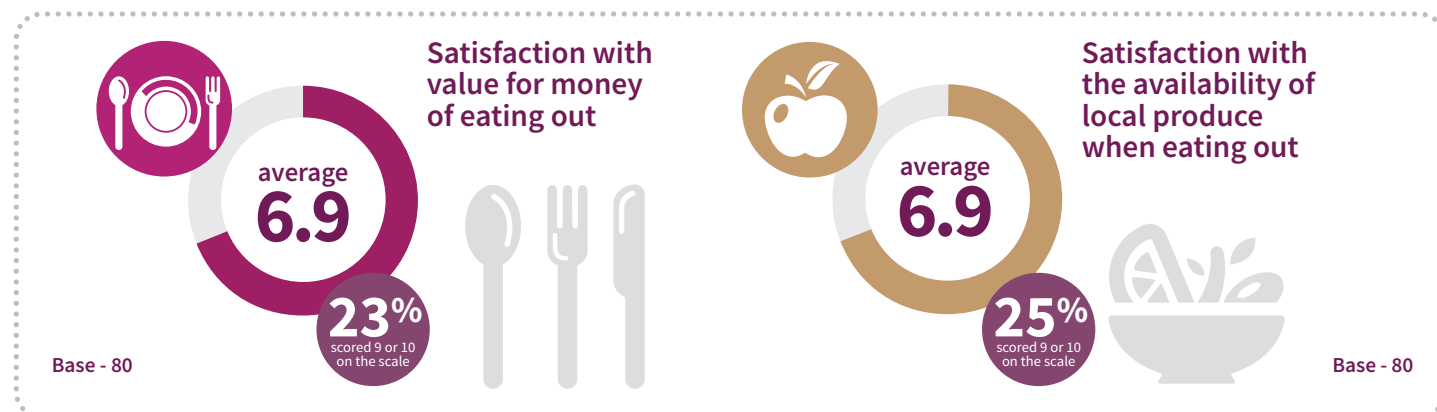
Accommodation choice in the Lothians was fairly evenly split between hotels, B&Bs / guest houses / restaurants with rooms, and self-catering - each accounting for around a quarter of visitors to the area. Staying with friends or family was also popular, mentioned by a fifth of visitors to the Lothians.

Visitors in this area were more likely than average to stay in Airbnb style accommodation (7%).

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

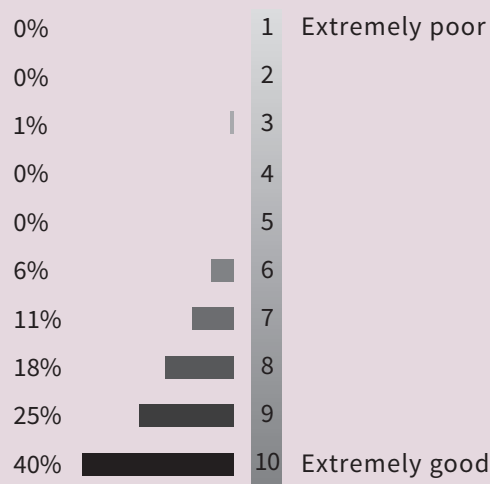
Visitors to Lothians expressed high levels of satisfaction with particular aspects of the visitor experience notably: the ease of travelling around the area, value for money of attractions and local knowledge of accommodation staff.

Consistent with other areas, the aspects with lower satisfaction levels related to eating out – both the availability of local produce and value for money – as well as availability of free Wi-Fi at their accommodation.

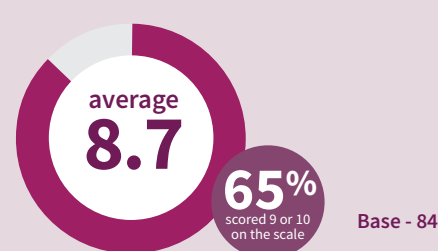
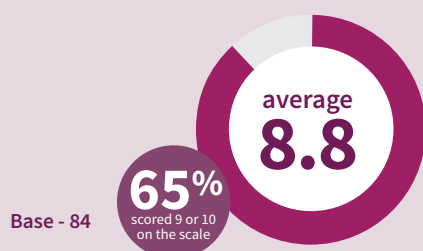
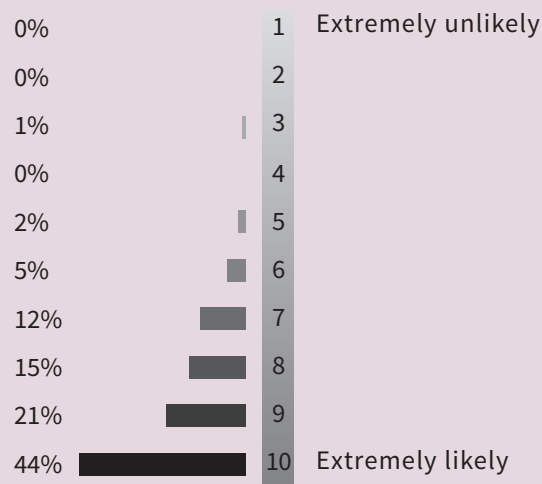




### Your overall experience?



### How likely are you to recommend?



High levels of satisfaction were recorded with the overall experience enjoyed by visitors in Lothians. 94% of visitors gave a rating of at least 7 out of 10, with 65% giving the highest scores (9 or 10) on the satisfaction scale. 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 state the highest levels of satisfaction.

92% of visitors to the Lothians stated their intention (7-10) to recommend the area as a holiday destination to friends or family, with 65% giving scores of 9 or 10 on the recommendation scale.

## 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](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.