

EAST BEACH, LOSSIEMOUTH

Scotland Visitor Survey 2015 & 2016

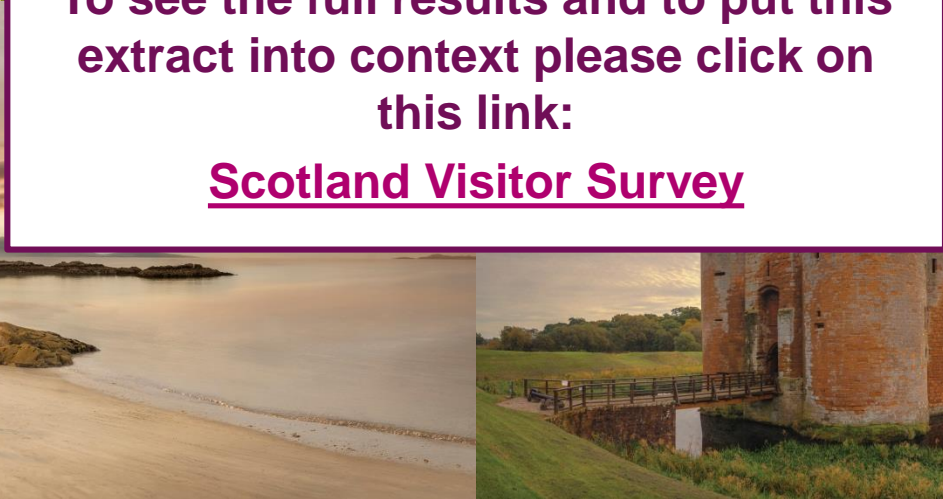
Motivations To Visit - Extract



The following slides collate the insights on motivations to visit Scotland only.

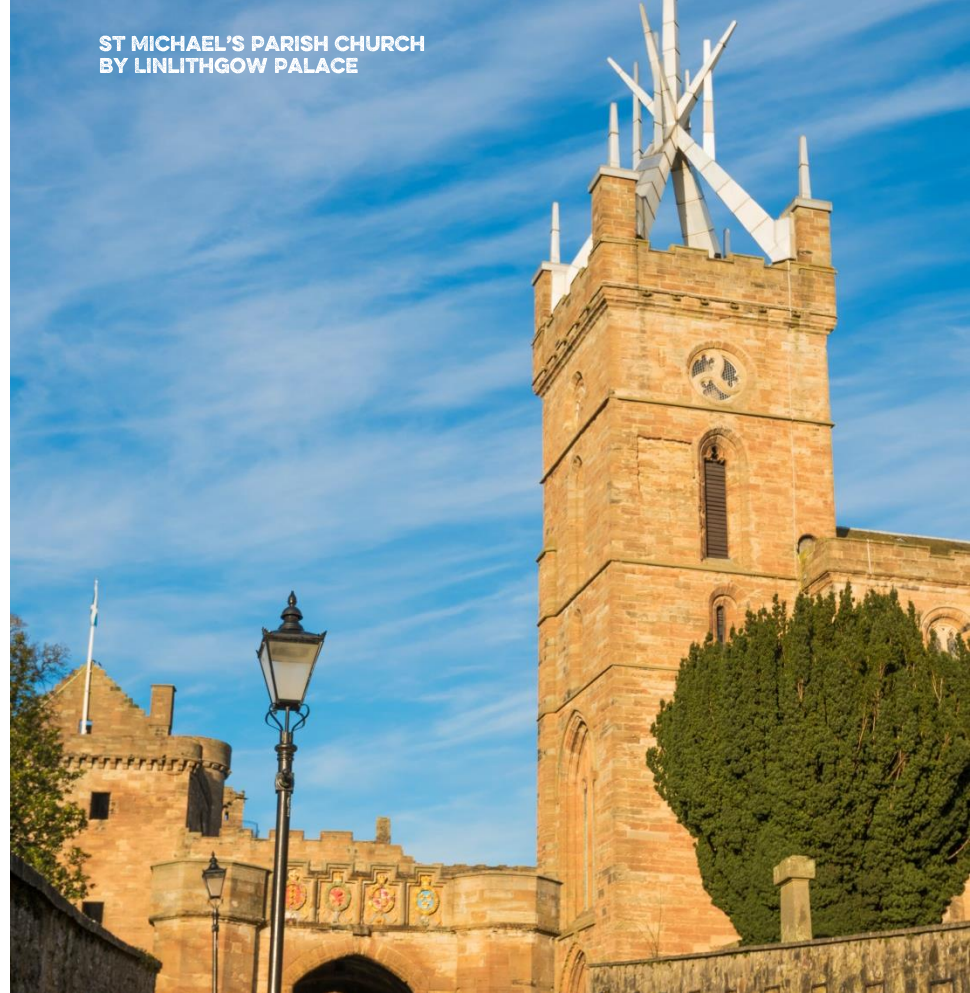
To see the full results and to put this extract into context please click on this link:

[Scotland Visitor Survey](#)

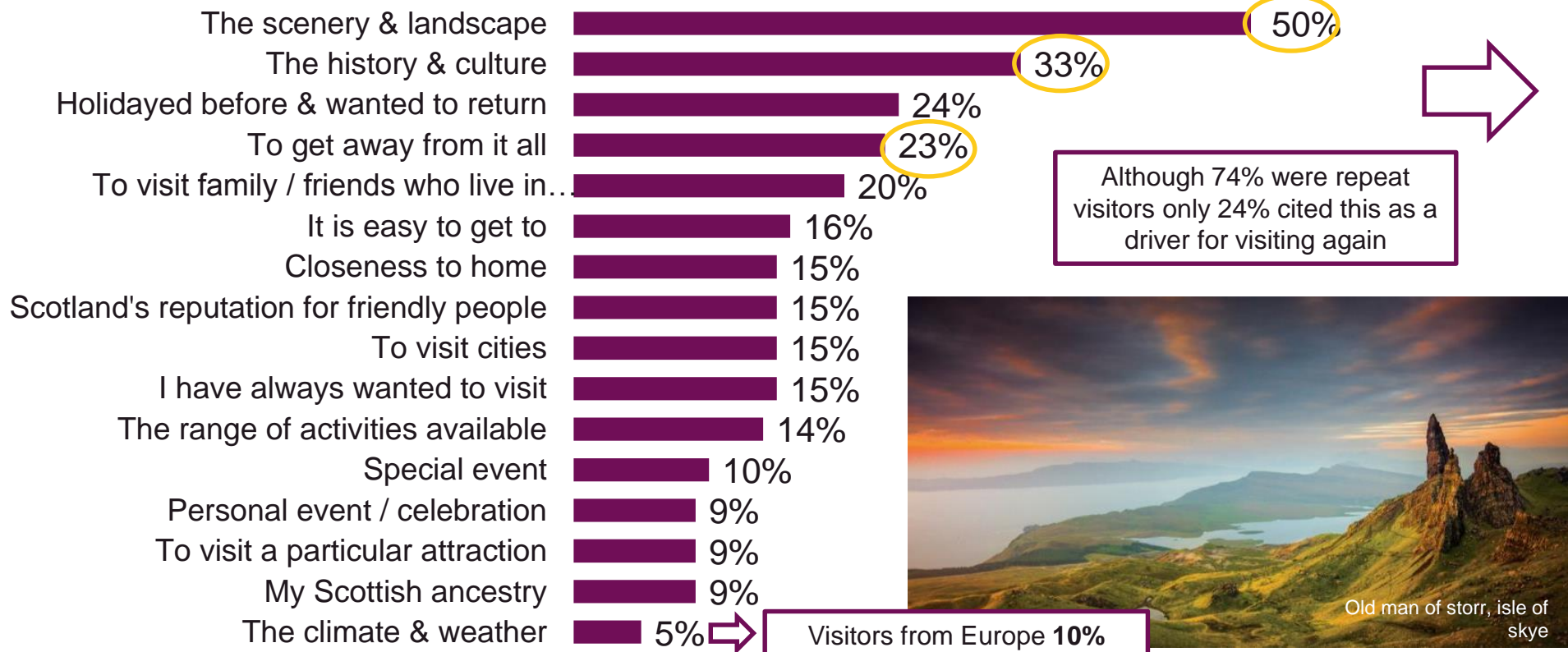


- **VisitScotland regularly undertake Scotland-wide visitor surveys.** Past surveys have been undertaken in 2004/2005, 2007/2008 and 2011/2012
- **Survey content is updated each time it is undertaken to reflect changes in the consumer and market environment.** The survey can explore different areas of the visitor experience
- The 2015 & 2016 Scotland Visitor Survey is a **2 year** research programme covering 19 regions of Scotland
- The 2 year programme is required to gain robust sample sizes for reporting at a regional level
- The Scotland Visitor Survey is a **summer only survey**, and due to the scale of the project, it is not carried out for the full year. As such results reflect the views of the main holiday season visitors who were in Scotland during May-September

ST MICHAEL'S PARISH CHURCH
BY LINLITHGOW PALACE



Scotland's scenery and landscape remains a key motivation to visit, as does its history and culture. Other drivers vary by market and visitor type.



Q10 Thinking broadly about your decision to choose Scotland for your holiday or short break, what was it that **attracted** you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (11743)

What Attracts Visitors To Scotland?

Top driver consistent for all markets, but other interesting differences also exist

Scot Residents

Top 3 Core Drivers

- Scenery & landscape (44%)
- Closeness to home (36%)
- To get away from it all (29%)

Over-Index on:

- Holidayed before & wanted to return (26%)
- Easy to get to (25%)
- Personal event / celebration (10%)

European Visitors

Top 3 Core Drivers

- Scenery & landscape (71%)
- History & culture (51%)
- A place I've always wanted to visit (41%)

Over-Index on:

- Visit cities (30%)
- Scotland's reputation for friendly people (25%)

Rest of UK Visitors

Top 3 Core Drivers

- Scenery & landscape (46%)
- Holidayed before & wanted to return (29%)
- History & culture (26%)

Over-Index on:

- Visit family / friends (25%)
- Special event (12%)
- Personal celebration (11%)

Long Haul Visitors

Top 3 Core Drivers

- Scenery & landscape (53%)
- History & culture (52%)
- A place I've always wanted to visit (34%)

Over-Index on:

- My Scottish ancestry (23%)

First Time Visitors

Top 3 Core Drivers

- Scenery & landscape (58%)
- History & culture (47%)
- A place I've always wanted to visit (42%)

Over-Index on:

- Visit cities (25%)

Repeat Visitors

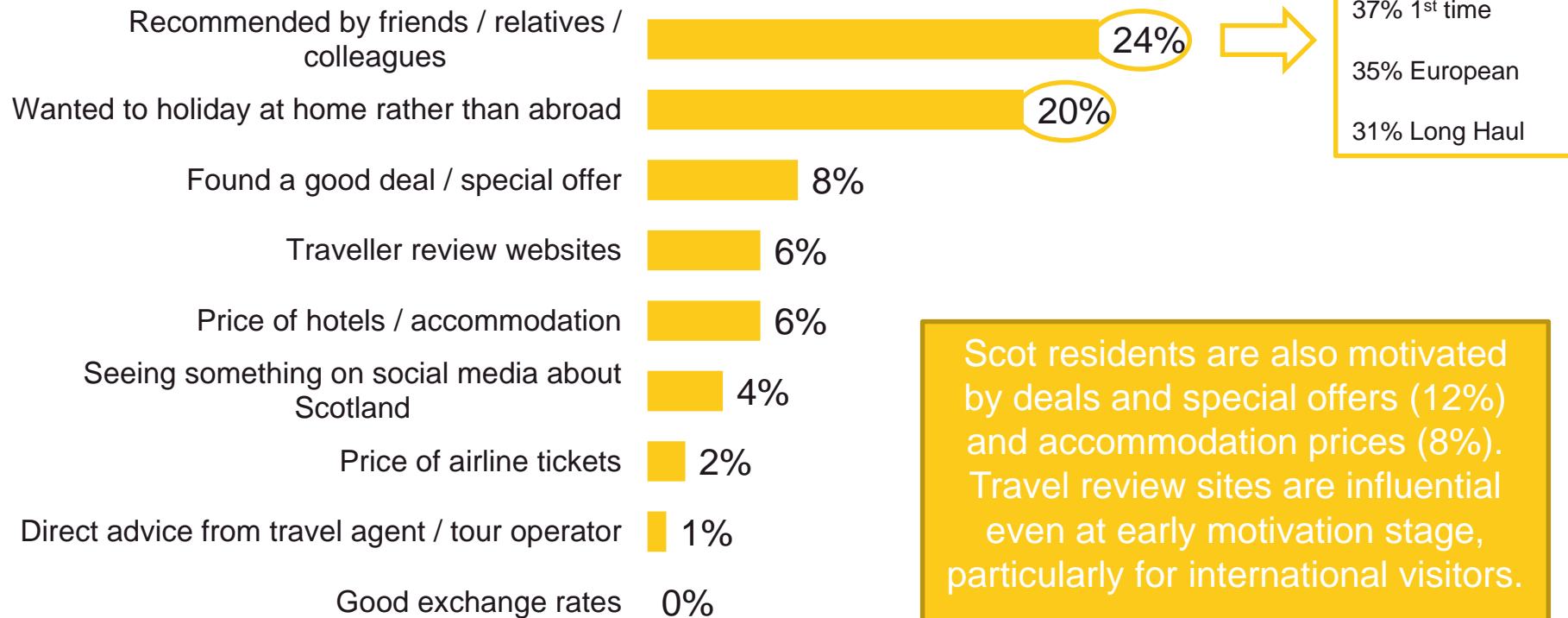
Top 3 Core Drivers

- Scenery & landscape (47%)
- Holidayed before & wanted to return (32%)
- History & culture (29%)

Over-Index on:

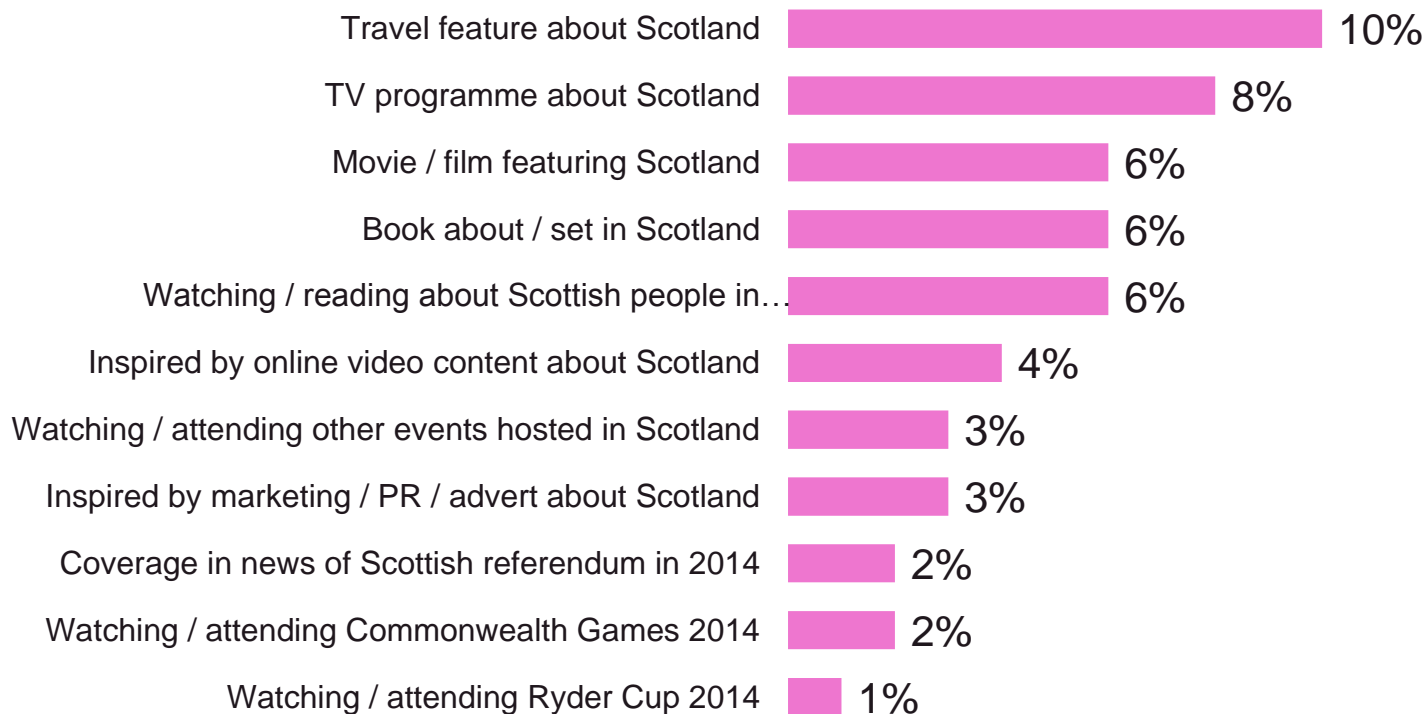
- To get away from it all (25%)
- Visit family / friends (24%)
- Closeness to home (20%)
- Easy to get to (19%)
- Range of activities (15%)
- To visit a particular attraction (9%)

Word of mouth recommendation is an important factor, particularly for European, Long Haul and first time visitors, whilst Scot residents are motivated by a desire to holiday at home



Q11 Which of the following **persuaded** you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (11743)

1 in 10 visitors were influenced by a travel feature about Scotland, whilst TV, film and books are also important prompts to consideration, especially for international visitors



Q12 Did any of these prompt you to consider Scotland for this holiday / short break? Base: S1 All (11743)

Outlander (TV and book) has clearly had a significant impact in inspiring visitors to visit, particularly those from USA

TV programme
about Scotland
(1096)

9%

Outlander

Base: 442

Coast
Travel Channel
Countryfile
Military Tattoo
Discovery channel
Neil Oliver
Springwatch
Rick Steves
Shetland
BBC documentary
Gene of Thrones

Movie / film
featuring
Scotland (1047)

9%

Highlander

Braveheart

Base: 574

Transpotting
Rob Roy
Skyfall
Harry Potter

Book about / set
in Scotland (932)

8%

Outlander

Base: 380

Ian Rankin
Harry Potter
Lewis Trilogy
Kidnapped
Walter Scott

	Aberdeen & Shire	Argyll & the Isles	Ayrshire & Arran	Cairngorms National Park	Dumfries & Galloway	Dundee & Angus	Edinburgh City	Fife	Glasgow City	Gr.Glasgow & Clyde Valley
x is a place I have always wanted to visit	27%	35%	32%	30%	23%	14%	50%	27%	37%	35%
I have spent a holiday / short break in x before and wanted to do so again	33%	38%	34%	49%	43%	16%	33%	37%	27%	29%
x's reputation for friendly people	16%	20%	19%	21%	15%	15%	25%	25%	23%	26%
To visit family/friends who live in x	45%	27%	28%	17%	24%	34%	22%	36%	39%	33%
The range of activities available (e.g. walking, mountain biking, golf)	15%	26%	23%	50%	18%	11%	14%	27%	15%	19%
To visit a particular attraction	19%	24%	13%	24%	32%	40%	40%	37%	27%	30%
To get away from it all	25%	48%	36%	41%	41%	24%	20%	33%	19%	27%
To visit cities	19%	7%	3%	2%	6%	20%	33%	23%	33%	25%
The history and culture	36%	45%	27%	31%	35%	25%	65%	41%	53%	48%
The scenery and landscape	50%	84%	68%	71%	63%	40%	61%	59%	39%	71%
The climate and weather	4%	4%	6%	8%	10%	4%	8%	12%	5%	6%
Closeness to home	9%	13%	17%	22%	13%	9%	4%	8%	9%	5%
It is easy to get to	21%	15%	27%	26%	26%	10%	16%	24%	22%	18%
Something else	19%	20%	18%	21%	23%	18%	15%	19%	19%	22%
Unsure	-	0%	1%	-	2%	3%	0%	2%	2%	3%
BASE	193	177	185	112	141	75	1053	119	389	198

Q7 And what was it that attracted you to come to **REGION** on this occasion?

	Highlands	LLTNP	Lothians	Perthshire	Scottish Borders	SFFV	Orkney	Outer Hebrides	Shetland
x is a place I have always wanted to visit	58%	35%	33%	20%	42%	31%	48%	59%	52%
I have spent a holiday / short break in x before and wanted to do so again	36%	39%	26%	39%	35%	29%	34%	48%	30%
x's reputation for friendly people	26%	22%	10%	20%	22%	17%	17%	24%	26%
To visit family/friends who live in x	16%	15%	38%	31%	20%	33%	23%	28%	39%
The range of activities available (e.g. walking, mountain biking, golf)	27%	31%	18%	24%	32%	12%	16%	22%	16%
To visit a particular attraction	31%	14%	21%	19%	29%	40%	39%	31%	23%
To get away from it all	37%	48%	29%	38%	34%	28%	29%	49%	33%
To visit cities	22%	12%	30%	11%	17%	33%	4%	2%	2%
The history and culture	55%	35%	53%	34%	47%	48%	74%	54%	57%
The scenery and landscape	87%	78%	60%	74%	67%	68%	75%	87%	75%
The climate and weather	10%	8%	10%	8%	6%	6%	4%	7%	4%
Closeness to home	9%	12%	7%	7%	13%	9%	4%	11%	6%
It is easy to get to	16%	23%	14%	21%	22%	18%	4%	11%	5%
Something else	15%	21%	17%	19%	17%	18%	27%	18%	27%
Unsure	1%	2%	4%	0%	-	1%	-	-	-
BASE	975	84	84	149	127	132	209	167	135

Q7 And what was it that attracted you to come to **REGION** on this occasion?

- A complex mix of influences attract visitors to Scotland. There is no ‘one size that fits all’.
- Scotland’s scenery and landscape remain the core drivers for overnight visits to Scotland followed closely by history & culture. These are Scotland’s key strengths for all types of visitor and should not be underestimated in marketing messages.
- Some key differences begin to emerge by market and type of visitor. ‘Getting away from it all’ is of more significance for Scotland residents and for repeat visitors. Cities are a greater pull for first time visitors. First time visitors and European visitors have a strong desire to travel here because ‘Scotland is a place I have always wanted to visit’. Therefore, careful consideration of the target market should be given to marketing messages.
- Visitor type can also influence specific drivers to each region. Visiting friends and family is an important driver for overnight visits to Aberdeen & Aberdeenshire. ‘Getting away from it all’ is a strong influencer for visits to Argyll & the Isles as well as for Dumfries & Galloway. People want to visit the Cairngorms National Park because of its range of activities. Each region should consider its own strengths as well as its target audience alongside the core drivers of Scotland’s natural assets and history.

Further information

The Scotland Visitor Survey 2015 & 2016 was conducted for VisitScotland by Jump Research.

Further data and fact sheets are available via:

www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx

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