

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. **674** visitors were interviewed in Perthshire and **149** visitors answered specific questions about their visit to the area via the follow-up online survey.



St Matthew's Church on the shore of the River Tay, Perth

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:

Perthshire (2015)

924,000 overnight visits

85% domestic visits

15% overseas visits

Top overseas markets: **Germany, USA, France, Australia, Netherlands**

£196m total visitor spend



What attracted visitors to come...

Perthshire (top 10)

Base	149
1 The scenery & landscape	74%
2 Holidayed here before and wanted to return	39%
3 To get away from it all	38%
4 The history & culture	34%
5 To visit family / friends who live there	31%
6 The range of activities available	24%
7 It is easy to get to	21%
8 A place I have always wanted to visit	20%
9 Its reputation for friendly people	20%
10 To visit a particular attraction	19%

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%

The dominant driver to visit Perthshire was the scenery and landscape, mentioned by almost three-quarters of visitors to this area. Just under two-fifths had visited the area before and were keen to return and 31% said they were visiting family or friends.

The idea of getting away from it all was mentioned as a key motivator to visit Perthshire by just under two-fifths; whilst the history and culture and the range of activities attracted 34% and 24% of visitors respectively.



Activities undertaken

Perthshire (top 10)

	Base	149
1	Sightseeing by car / coach / on foot	76%
2	Short walk, stroll	67%
3	Visited a historic house, stately home, castle	58%
4	Shopping	46%
5	Visited cities	46%
6	Visited a cathedral, church, abbey, other religious building	45%
7	Visited a country park / garden	40%
8	Long walk, hike, ramble	40%
9	Visited a woodland / forest area	39%
10	Visited a visitor / heritage centre	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%

Three-quarters of visitors to Perthshire mentioned sightseeing (on foot or by car or coach) making this the top activity undertaken in this area.

Visitors to Perthshire were more likely than the average visitor to go for short walks or strolls and to say they had visited a woodland or forest area. Long walks, hikes and rambles were undertaken by two-fifths of visitors to the area and the same proportion visited country parks and gardens.

Visiting a historic house, stately home or castle was also a key activity for visitors Perthshire whilst just under half said they went shopping in the area.



Type of accommodation stayed in

Perthshire (top 6)

	Base	149
1	Hotel	40%
2	Self-catering	31%
3	B&B / Guest House / Restaurant with Rooms	20%
4	Friends / family	12%
5	Camping	6%
6	Touring caravan / motorhome	6%

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%

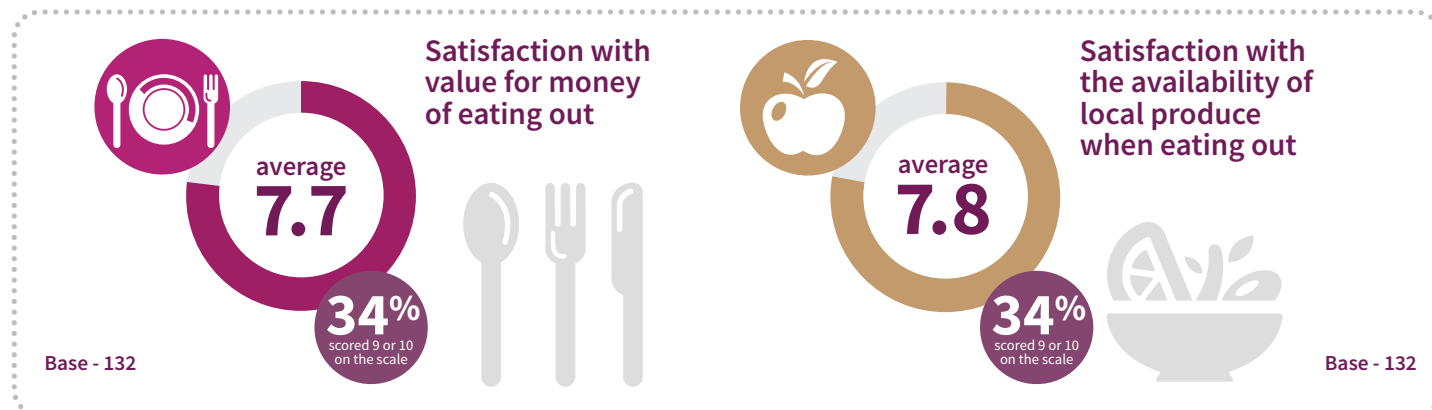
Hotels were the most popular type of accommodation in Perthshire with 2 in 5 visitors staying in hotels whilst visiting the area.

Just under a third stayed in self-catering accommodation – a higher than average proportion – and a fifth chose B&Bs or guest houses.

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

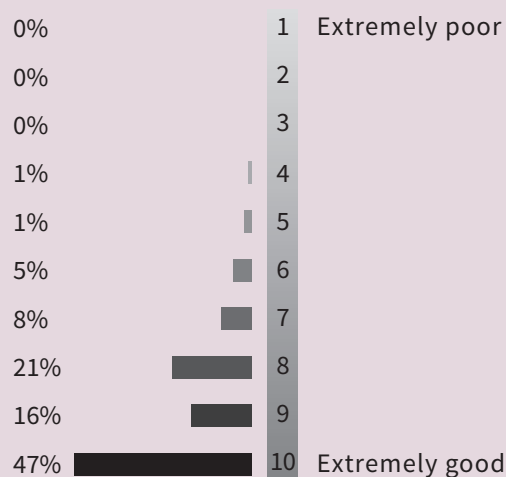
Visitors to Perthshire rated the key aspects of their experience highly, all receiving average scores of more than 7 out of 10. Satisfaction levels were particularly high with the ease of getting around the area, value for money of attractions and the service and local knowledge of accommodation staff.

The lowest satisfaction score (average 7.3) was given for the availability of free Wi-Fi at Perthshire accommodation.

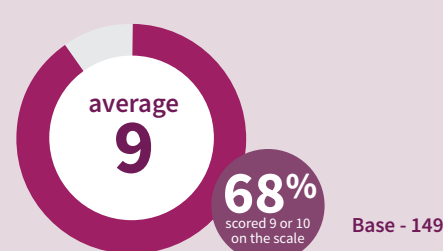
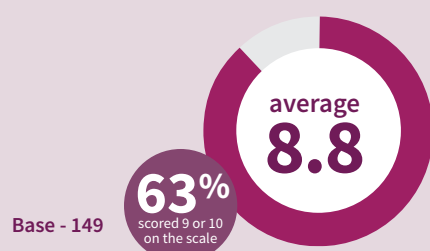
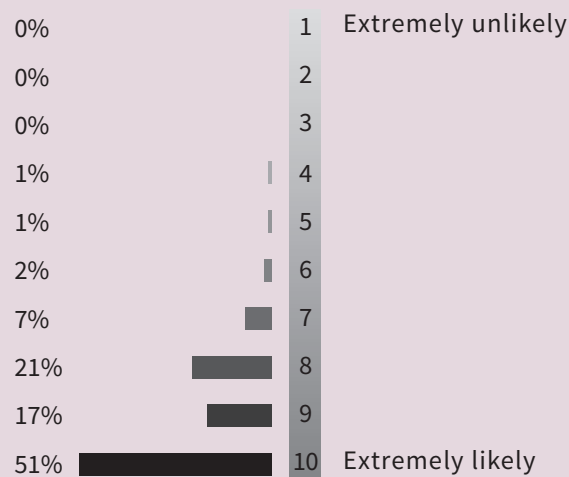




Your overall experience?



How likely are you to recommend?



92% of visitors to Perthshire gave an overall rating of 7 or more out of 10 for satisfaction with their experience. More than three-fifths scored 9 or 10 on the scale, emphasising their high satisfaction levels. 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 these highest scores.

Visitors also expressed a high likelihood to recommend Perthshire as a holiday destination, with almost all (96%) giving 7-10 ratings; two-thirds of those at the 9 and 10 out of 10 level. This suggests a high proportion of visitors will go on to endorse 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.