SCOTLAND VISITOR SURVEY 2023

MOTIVATIONS AND INSPIRATION (29 SLIDES)

1. What were the drivers for taking a holiday?

2. What were the main reasons for choosing Scotland?

3. What were the key sources of inspiration which helped visitors to decide on Scotland (includes film, TV and literature)?

April 2024
Contents

Motivations and Inspiration

Background

Summary

1. Drivers for taking a holiday
   1.1 Drivers summary
   1.2 Top ten drivers (by market)
   1.3 Top five drivers (by life stage)

2. Reasons for choosing Scotland
   2.1 Top ten
   2.2 Full list
   2.3 UK market
   2.4 Europe
   2.5 Long haul
   2.6 Market summary
   2.7 Top 3 comparisons
   2.8 Life stage
   2.9 Subgroup analysis

3. Sources of inspiration
   3.1 Inspiration summary
   3.2 Category summary
   3.3 Breakdown
   3.4 Breakdown (digital)
   3.5 Life stage
   3.6 TV programmes
   3.7 Films
   3.8 Books and literature

4. Definitions
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 its regions.

Full details of the research objectives, methodology and technical appendix are available within the Background and Methodology report.
Scotland’s iconic scenery and landscape and the richness of our history and culture remain as the top motivators for choosing Scotland. We can amplify the strength of these assets by connecting people to our legends and stories which brings the history and geography together in new and surprising ways.

Scots are well known for their warmth of welcome and ‘Scotland’s people’ continues to be a key reason for choosing Scotland. This helps create the emotional connection that visitors find here.

Visitors recall a diverse range of sources of inspiration. The number of sources is often linked to how much is invested in the trip. For domestic travellers, familiarity with Scotland is often higher and range of sources recalled lower than overseas visitors.

Film, TV and literature has a role in inspiring visitors, helping to showcase Scotland, particularly to our overseas markets. The number of film and TV programmes mentioned shows a breadth of influence and a longevity well beyond the release year of a film or TV programme. Local Hero and The Wickerman were mentioned by individual visitors and these films have seen their 40th and 50th release anniversaries in 2023.
There is no single driver to taking a holiday but a combination of many. Respondents were primarily seeking new experiences, a connection with nature or the outdoors and time with loved ones when they were considering potential holiday destinations.

- I wanted to travel to somewhere new: 38%
- I wanted to connect with nature or be outdoors: 38%
- I needed family time or time with my partner: 35%
- I needed to get away from it all and have a rest: 26%
- Because of a particular interest: 19%
- I wanted to spend time with friends: 18%
- I wanted to learn something new: 17%
- I wanted somewhere lively, good atmosphere, lots to see and do: 17%
- To celebrate a special occasion: 15%
- I was looking for an active holiday, with exercise or sport: 12%
- I was looking for adventure or a challenge: 10%
- I wanted to go somewhere where there was great food: 9%
- I wanted to go somewhere luxurious where I could feel pampered: 2%
- Family history, ancestry: 2%
- Other: 10%

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland? Base (all): 3,011
1.1 Drivers for taking a holiday: summary

Whilst the core drivers are broadly consistent, there are market differences. **UK respondents are more likely than other markets to mention family time and getting away from it all.**

**European respondents are driven by a more energetic holiday.** They are more likely to mention a connection with nature and wanting a lively atmosphere. They tend to have a younger profile than long haul and UK visitors.

**Travelling somewhere new and learning something new were more likely to be mentioned by long haul respondents.** They are less likely to be looking for rest and relaxation.

**Food** is typically not a primary driver for taking a holiday but it has a crucial role later in the visitor journey, on arrival at the destination.

**Ancestry** is also not typically a primary driver for taking a holiday but it plays a greater role in choosing Scotland for some of our key markets.
### 1.2 Top ten drivers for taking a holiday: by market

Interpretation note for table: numbers with a * denotes a statistically significant difference

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total sample</th>
<th>UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel somewhere new</td>
<td>38%</td>
<td>32%</td>
<td>47%</td>
<td>55% *</td>
</tr>
<tr>
<td>Connect with nature or outdoors</td>
<td>38%</td>
<td>37%</td>
<td>54% *</td>
<td>34%</td>
</tr>
<tr>
<td>Family/partner time</td>
<td>35%</td>
<td>37% *</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Get away from it all</td>
<td>26%</td>
<td>29%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>Particular interest</td>
<td>19%</td>
<td>18%</td>
<td>18%</td>
<td>26% *</td>
</tr>
<tr>
<td>Time with friends</td>
<td>18%</td>
<td>19%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Learn something new</td>
<td>17%</td>
<td>11%</td>
<td>31%</td>
<td>32% *</td>
</tr>
<tr>
<td>Lively, good atmosphere, lots to see and do</td>
<td>17%</td>
<td>11%</td>
<td>37% *</td>
<td>27%</td>
</tr>
<tr>
<td>Special occasion</td>
<td>15%</td>
<td>14%</td>
<td>11%</td>
<td>19% *</td>
</tr>
<tr>
<td>Active holiday</td>
<td>12%</td>
<td>11%</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: 3,011

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
1.3 Top five drivers for taking a holiday: by life stage

<table>
<thead>
<tr>
<th>Pre Nesters</th>
<th>Families</th>
<th>Older independents</th>
<th>Retirement age</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Family time 39%</td>
<td>3. Somewhere new 36%</td>
<td>3. Family time 34%</td>
<td>3. Family time 22%</td>
</tr>
<tr>
<td>4. Somewhere lively 35%</td>
<td>4. Get away from it all 27%</td>
<td>4. Get away from it all 29%</td>
<td>4. A particular interest 22%</td>
</tr>
<tr>
<td>5. Get away from it all 35%</td>
<td>5. Somewhere lively 21%</td>
<td>5. A particular interest 19%</td>
<td>5. Time with friends 21%</td>
</tr>
</tbody>
</table>

Base: 338                        Base: 327                        Base: 1,406                      Base: 901

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
2. Reasons for choosing Scotland

• What calls people to Scotland is personal to the individual and may be
diverse and varied.
• But we have core assets which continue to resonate strongly with visitors
from all our markets. Scotland’s scenery and landscape (70%) and our
history and culture (48%) remain the core motivators cited by our visitors
for choosing Scotland.
• Whilst these core motivators have not changed, how we tell our stories
and how we connect people to these assets in new and surprising ways
is Scotland’s opportunity going forward.
• Visiting friends and family also drives many visitors to Scotland (22%) and
Scotland’s people should also be viewed as a core asset for tourism (21%)
• A specific Scottish attraction or experience can be a reason to drive visits
(19%). Examples mentioned include Edinburgh Castle, Falkirk Wheel, Skara
Brae and Highland Games.
• 15% highlight Scotland’s food and drink as a reason for choosing Scotland
which compares to 9% who ‘wanted to go somewhere where there was
great food’ in the earlier drivers for taking a holiday (section 1).

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
2.1 Reasons for choosing Scotland: top ten

Scotland’s scenery, history and culture remain the key motivations for visits. More than one in five visitors reported their trip was to visit friends or family.

- 70% scenery and landscape
- 48% history and culture
- 27% outdoor activities
- 22% visiting friends and family
- 21% Scotland’s people
- 19% attraction
- 16% ancestry
- 15% close to home
- 15% food & drink
- 9% event or festival

Q6 (Stage 2): Thinking of your recent trip, which, if any, of these reasons initially attracted you to choose Scotland for your recent trip? Base (all): 3,011
2.2 Reasons for choosing Scotland: full list

- The scenery and landscape: 70%
- The history and culture: 48%
- Outdoor activities available: 27%
- Visiting friends or family who live in Scotland: 22%
- Scotland’s people: 21%
- A Scottish attraction: 19%
- My or my family’s Scottish ancestry: 16%
- It’s easy to get to or close to home: 15%
- Scotland’s food and drink: 15%
- A particular experience found in Scotland: 9%
- An event or festival: 9%
- A specific hotel or other accommodation: 6%
- A personal event: 6%
- A story or legend about Scotland: 5%
- A specific restaurant or eating experience: 3%
- I have a holiday or second home in Scotland: 2%
- A business event: 1%

Q6 (Stage 2): Thinking of your recent trip, which, if any, of these reasons initially attracted you to choose Scotland for your recent trip?

Base (all): 3,011
• The reasons for choosing Scotland will be influenced by a visitor's knowledge and familiarity with the country.

• Whilst our core assets of scenery and history are top motivators, the UK market is also driven by a range of other reasons.

• Visiting friends and family (rest of the UK visitors) and being close to home (Scotland residents) are particularly strong for the domestic market.
2.4 Reasons for choosing Scotland

European visitors

- Scotland’s scenery and landscape is a very strong driver for European visitors, particularly the Northern European markets.
- Closely connected is the availability of outdoor activities which is a stronger driver for Dutch and German visitors than other markets.
- European visitors are also most likely to state Scotland’s people as a reason for choosing Scotland, particularly German and Southern European visitors.
- A story or legend about Scotland, whilst a smaller driver, resonates more strongly for Europeans, particularly French and German visitors.
2.5 Reasons for choosing Scotland

Long haul visitors

• Although Scotland’s scenery is the top reason for choosing Scotland, our history and culture is close behind and resonates strongly for long haul markets, especially those from North America.

• Scotland’s people also drives visits for our USA visitors. Ancestral ties are much more important to our Canadian visitors than other visitors, closely followed by Australasia and visitors from the USA.

• Australian visitors have strong family connections with Scotland and much more likely to state visiting friends and family as a key driver.

• Scotland’s food and drink is a stronger driver for USA visitors than other markets.
### 2.6 Reasons for choosing Scotland: market summary

Interpretation note for table: numbers with a * denotes a statistically significant difference

<table>
<thead>
<tr>
<th>Reason for visiting Scotland</th>
<th>Total sample</th>
<th>Domestic</th>
<th>Overseas</th>
<th>Scotland</th>
<th>Rest of UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenery and landscape</td>
<td>70%</td>
<td>66%</td>
<td>78%</td>
<td>61%</td>
<td>69%</td>
<td>82% *</td>
<td>75%</td>
</tr>
<tr>
<td>History and culture</td>
<td>48%</td>
<td>40%</td>
<td>68%</td>
<td>28%</td>
<td>44%</td>
<td>65%</td>
<td>70% *</td>
</tr>
<tr>
<td>Outdoor activities</td>
<td>27%</td>
<td>27%</td>
<td>28%</td>
<td>26%</td>
<td>27%</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Visiting friends or family</td>
<td>22%</td>
<td>24%</td>
<td>19%</td>
<td>15%</td>
<td>27% *</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Scotland’s people</td>
<td>21%</td>
<td>15%</td>
<td>34%</td>
<td>-</td>
<td>20%</td>
<td>38% *</td>
<td>32% *</td>
</tr>
<tr>
<td>A Scottish attraction</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>15%</td>
<td>20%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Scottish ancestry</td>
<td>16%</td>
<td>12%</td>
<td>24%</td>
<td>5%</td>
<td>15%</td>
<td>3%</td>
<td>41% *</td>
</tr>
<tr>
<td>Close to home</td>
<td>15%</td>
<td>22%</td>
<td>-</td>
<td>50%</td>
<td>12%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Scotland’s food and drink</td>
<td>15%</td>
<td>14%</td>
<td>17%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Particular experience</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
<td>6%</td>
<td>10%</td>
<td>7%</td>
<td>12% *</td>
</tr>
<tr>
<td>Base:</td>
<td>3,011</td>
<td>1,531</td>
<td>1,480</td>
<td>456</td>
<td>1,075</td>
<td>625</td>
<td>795</td>
</tr>
</tbody>
</table>

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
## 2.7 Reasons for choosing Scotland: top 3 market summary

### Scotland residents
1. Scenery and landscape (61%)
2. Close to home (50%)
3. History and culture (28%)
4. Outdoor activities (26%)

**Over-index on:**
- Close to home (50%)
- Have a second home (6%)

### European visitors
1. Scenery and landscape (82%)
2. History and culture (65%)
3. Scotland’s people (38%)

**Over-index on:**
- Scenery and landscape (82%)
- History and culture (65%)
- Scotland’s people (38%)

### Rest of UK visitors
1. Scenery and landscape (69%)
2. History and culture (44%)
3. Outdoor activities (27%) Visiting friend and family (27%)

**Over-index on:**
- Visiting friends and family (27%)

### Long haul visitors
1. Scenery and landscape (75%)
2. History and culture (70%)
3. My family’s Scottish ancestry (41%)

**Over-index on:**
- Scenery and landscape (75%)
- History and culture (70%)
- My family’s Scottish ancestry (41%)
## 2.8 Reasons for choosing Scotland: by life stage

<table>
<thead>
<tr>
<th>Pre Nesters</th>
<th>Families</th>
<th>Older independents</th>
<th>Retirement age</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
</tr>
<tr>
<td>1. Scenery and landscape 76%</td>
<td>1. Scenery and landscape 73%</td>
<td>1. Scenery and landscape 71%</td>
<td>1. Scenery and landscape 66%</td>
</tr>
<tr>
<td>2. History and culture 56%</td>
<td>2. History and culture 41%</td>
<td>2. History and culture 50%</td>
<td>2. History and culture 47%</td>
</tr>
<tr>
<td>3. Outdoor activities 35%</td>
<td>3. Outdoor activities 33%</td>
<td>3. Outdoor activities 27%</td>
<td>3. Visiting friends, family 24%</td>
</tr>
<tr>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
</tr>
<tr>
<td>• History and culture 56%</td>
<td>• Outdoor activities 33%</td>
<td>• Older independents did not over-index on any reason.</td>
<td>• A specific hotel 9%</td>
</tr>
<tr>
<td>• Scotland’s people 28%</td>
<td>• Easy to get to 22%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Outdoor activities 35%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Base:**
- Pre Nesters: 338
- Families: 327
- Older independents: 1,406
- Retirement age: 901

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
## 2.9 Reasons for choosing Scotland: subgroup summary

<table>
<thead>
<tr>
<th>Visitors travelling with pets (i.e. dogs)</th>
<th>Visitors on a trip of a lifetime</th>
<th>Urban visitors</th>
<th>Rural visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
<td><strong>Top reasons:</strong></td>
</tr>
<tr>
<td>1. Scenery and landscape 81%</td>
<td>1. Scenery and landscape 80%</td>
<td>1. Scenery and landscape 50%</td>
<td>1. Scenery and landscape 72%</td>
</tr>
<tr>
<td>2. History and culture 42%</td>
<td>2. History and culture 70%</td>
<td>2. History and culture 42%</td>
<td>2. History and culture 38%</td>
</tr>
<tr>
<td>3. Outdoor activities 36%</td>
<td>3. Outdoor activities 24%</td>
<td>3. Visiting friends, relatives 28%</td>
<td>3. Outdoor activities 31%</td>
</tr>
<tr>
<td>4. Easy to get to 27%</td>
<td>4. Scotland’s people 36%</td>
<td>4. A Scottish attraction 20%</td>
<td>4. Easy to get to 24%</td>
</tr>
<tr>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
<td><strong>Over index on:</strong></td>
</tr>
<tr>
<td>1. Scenery and landscape 81%</td>
<td>1. Scenery and landscape 80%</td>
<td>1. Visiting friends, relatives 28%</td>
<td>1. Outdoor activities 31%</td>
</tr>
<tr>
<td>2. History and culture 70%</td>
<td>2. History and culture 70%</td>
<td>2. Scotland’s people 36%</td>
<td>2. Scotland’s people 36%</td>
</tr>
<tr>
<td>3. Outdoor activities 24%</td>
<td>3. Ancestry 29%</td>
<td>3. A Scottish attraction 26%</td>
<td>3. Ancestry 29%</td>
</tr>
<tr>
<td>4. Scotland’s people 36%</td>
<td><strong>Story or legend 11%</strong></td>
<td><strong>Story or legend 11%</strong></td>
<td><strong>Story or legend 11%</strong></td>
</tr>
<tr>
<td>5. Ancestry 29%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
3. 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?

- Conversations with friends or family: 52%
- Online info, imagery, itineraries from VisitScotland: 18%
- Printed travel guide books or brochures: 13%
- Info from travel bloggers, influencers, etc.: 13%
- Peer review websites (e.g., TripAdvisor): 12%
- TV programmes featuring Scotland: 11%
- Online info from tourism businesses: 8%
- Films featuring Scotland: 7%
- Online travel guides: 7%
- Book or literature featuring Scotland: 6%
- Online travel feature providers: 6%
- Online info from transport providers: 6%
- None: 20%

Base (all): 3,011
3.1 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.
### 3.2 Sources of Inspiration when deciding on Scotland: net figures

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

<table>
<thead>
<tr>
<th>Source Type</th>
<th>All Visitors</th>
<th>UK</th>
<th>Europe</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal recommendations</td>
<td>53%</td>
<td>51%</td>
<td>55%</td>
<td>63%</td>
</tr>
<tr>
<td>Digital sources</td>
<td>42%</td>
<td>37%</td>
<td>51%</td>
<td>55%</td>
</tr>
<tr>
<td>Film, TV or books featuring Scotland</td>
<td>19%</td>
<td>11%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Printed information</td>
<td>15%</td>
<td>11%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Total average sources used</td>
<td>2.30</td>
<td>1.99</td>
<td>2.74</td>
<td>3.05</td>
</tr>
</tbody>
</table>

Interpretation note: The above table displays Net figures, showing the total proportion who mentioned at least one source in each category.
### 3.3 Sources of inspiration when deciding on Scotland: breakdown

<table>
<thead>
<tr>
<th>Personal Recommendations</th>
<th>All Visitors</th>
<th>UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversations with friends and family</td>
<td>52%</td>
<td>50%</td>
<td>53%</td>
<td>59%</td>
</tr>
<tr>
<td>Advice from personal travel advisor or consultants</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TV, film or books</th>
<th>All Visitors</th>
<th>UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Films featuring Scotland</td>
<td>7%</td>
<td>4%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>TV featuring Scotland</td>
<td>11%</td>
<td>7%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Book or literature featuring Scotland</td>
<td>6%</td>
<td>3%</td>
<td>11%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Printed information</th>
<th>All Visitors</th>
<th>UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers or magazines</td>
<td>5%</td>
<td>4%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Printed travel guide books or brochures</td>
<td>13%</td>
<td>8%</td>
<td>24%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Interpretation note: Long haul refers to USA, Canada and Australasia
3.4 Sources of Inspiration when deciding on Scotland: breakdown

<table>
<thead>
<tr>
<th>Digital sources</th>
<th>All Visitors</th>
<th>UK</th>
<th>Europe</th>
<th>Long haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online travel feature providers</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Online travel guides</td>
<td>7%</td>
<td>4%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Peer review websites</td>
<td>12%</td>
<td>11%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Information from travel bloggers and influencers</td>
<td>13%</td>
<td>9%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Online information from tour operators</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>Travel or price comparison providers</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Online information, imagery or itineraries from VisitScotland</td>
<td>18%</td>
<td>16%</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Online information from transport providers</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Online information from tourism businesses</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Bargain deals on airfares, accommodation or tours</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Interpretation note: Long haul refers to USA, Canada and Australasia
3.5 Sources of Inspiration when deciding on Scotland: life stage

**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

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?
3.6 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.

Outlander
Shetland
Men in Kilts
A train journey show
Rick Steves
Grand Tour series (Paul Murton)
Hamish Macbeth
Susan Calman
Hairy Bikers
Reign
Escape to the Country
Monarch of the Glen

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

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? Open ended Base (inspired by TV programme): 375
3.7 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.

<table>
<thead>
<tr>
<th>Including</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlander</td>
<td>58</td>
</tr>
<tr>
<td>Braveheart</td>
<td>56</td>
</tr>
<tr>
<td>Harry Potter</td>
<td>45</td>
</tr>
<tr>
<td>James Bond</td>
<td>18</td>
</tr>
<tr>
<td>Highlander</td>
<td>18</td>
</tr>
<tr>
<td>Local Hero</td>
<td>11</td>
</tr>
<tr>
<td>Rob Roy</td>
<td>8</td>
</tr>
<tr>
<td>Shetland</td>
<td>6</td>
</tr>
<tr>
<td>Outlaw King</td>
<td>6</td>
</tr>
<tr>
<td>Brave</td>
<td>4</td>
</tr>
<tr>
<td>Trainspotting</td>
<td>4</td>
</tr>
<tr>
<td>Mary Queen of Scots</td>
<td>4</td>
</tr>
</tbody>
</table>

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.
3.8 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.

<table>
<thead>
<tr>
<th>Including</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlander</td>
<td>57</td>
</tr>
<tr>
<td>History Books</td>
<td>27</td>
</tr>
<tr>
<td>Travel guide</td>
<td>15</td>
</tr>
<tr>
<td>Harry Potter</td>
<td>13</td>
</tr>
<tr>
<td>Peter May</td>
<td>6</td>
</tr>
<tr>
<td>Alexander McCall Smith</td>
<td>5</td>
</tr>
<tr>
<td>William Shakespeare</td>
<td>5</td>
</tr>
<tr>
<td>Ann Cleeve's books</td>
<td>4</td>
</tr>
<tr>
<td>Book about hill walking</td>
<td>4</td>
</tr>
</tbody>
</table>

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? Open ended Base (Inspired by book): 191
4. 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
Disclaimer:
This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.

Contact Us:
Insight Department
visitscotland.org visitscotland.com
research@visitscotland.com
Images © VisitScotland

April 2024