

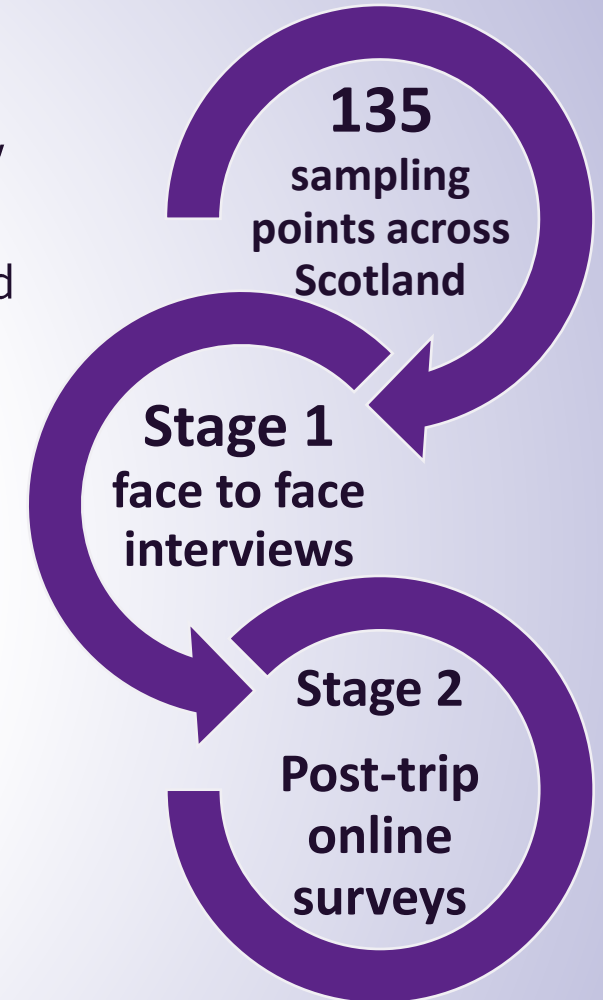
SPOTLIGHT ON OUR AUSTRALIAN VISITORS TO SCOTLAND

SOURCE: SCOTLAND VISITOR SURVEY
AVAILABLE ON VS.ORG

[VISITORS FROM AUSTRALIA - RESEARCH & STATS | VISITSCOTLAND.ORG](#)

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.
- Sample sizes for visitors from Australia (leisure overnight visitors only):
First stage face to face survey sample for visitors from Australia: n=495
Second stage follow-up online survey sample for. Australia: n=157
- Please note the data for individual European countries is unweighted.



Spotlight on visitors from Australia to Scotland (1)

52% repeat visitors
(of which 3% take trips in Scotland regularly)



48% first time visitors

66% over age 55

12% under 34

84%
toured Scotland



10%
stayed in one urban, city or town location

53%
were in employment
42%
were retired

26%
were on a trip of a lifetime



67% were on holiday as a couple

15% travelled with friends

10% were travelling solo



Spotlight on visitors from Australia to Scotland (2)

Top motivations for visiting Scotland

Scotland's scenery and our history and culture are strong drivers for our long haul markets.

Ancestral connections are also an important driver for Australian visitors, followed by visiting friends and family in Scotland.



55%
took part in a food and drink experience

Key attractions visited:
castle or fort
cathedral or church,
historic house or palace,
museum or art gallery



Top activities undertaken

69%
viewed architecture and buildings

54%
shopping

40%
hillwalk or hike

38%
short guided tour

27%
boat trip



Source: Scotland Visitor Survey 2023

The visitor journey: visitors from Australia to Scotland

Inspiration



Planning



Booking



Getting to Scotland



Trips in Scotland



Post trip



Sources of inspiration

64% personal recommendations

54% digital information

36% film, TV or books featuring Scotland

(net figures)

Started planning **45.7 weeks** in advance prior to arrival

Sources used to plan

37% VisitScotland's website

47% accommodation providers

33% transport providers

63% travel intermediaries (net)

Started booking **27.3 weeks** in advance

Accommodation:

48% booked directly with providers

81% booked via travel intermediaries

Transport to Scotland:

51% booked directly with providers

55% via travel intermediaries

Activities:

50% booked in advance

Transport used to travel to Scotland

66% by plane:
18% direct
48% indirect

23% train within UK

24% by car :
3% own car
21% hire car

Accommodation used

71% hotel

38% B&B/GH

Net serviced accom:
82%

Net non serviced accom
59%

70% rated their trip 9 or 10 out of 10.

77% are likely to recommend Scotland (9 or 10 out of 10).

44% are quite or very likely to return in the next 5 years.

1. Visitor profile

The Australian visitor to Scotland had an older age profile than other core markets. 66% were over 55, with a considerable proportion over 65 (35%).

53% were in work, whilst **42%** were retired, a higher proportion than other long haul markets.

67% were on holiday as a couple, while **10%** were travelling solo.

7% reported they had a long-term health condition, disability or infirmity.

Summary



2. Visitor and trip profile

48% were first time visitors to Scotland.

37% of visitors from Australia reported that their trip to Scotland was a special holiday (eg a celebration), while 28% described it as regular holiday.

26% described their holiday as a trip of a lifetime.

Visitors from Australia have a very high likelihood to tour around Scotland; **84%** toured Scotland.

10% of visitors stayed in one urban location, a lower proportion compared with visitors from USA or Canada.

Summary



3. Holiday motivations and reasons for choosing Scotland

Scotland's scenery, history and culture, were the key motivations for visits. Scottish ancestry and visiting friends and family are also core drivers for Australian visitors.

Personal recommendations (64%) was the most influential source of inspiration, followed by digital resources (54%).

Film, TV or literature was also an important source of inspiration (36% net figure).

Summary



4. Holiday planning and booking

Visitors from Australia started planning their trips to Scotland **45.7 weeks in advance** and booked their trips **27.3 weeks** prior to arrival, a longer lead time than European markets.

63% used a type of travel intermediary for holiday planning. Just over a third mentioned the use of VisitScotland's website for trip planning (37%).

Travel intermediaries play a significant role in accommodation booking with 81% citing their use. 55% booked their travel to Scotland via an intermediary.

50% of visitors from Australia booked activities/experiences prior to arrival.

Summary



5. Transport and accommodation

66% of visitors from Australia travelled to Scotland by plane, most often on an indirect flight.

31% travelled to Scotland using public transport (ferry, coach, train).

24% travelled to Scotland by car, most often a hire car.

For some visitors from Australia, their trip to Scotland may have been part of a longer trip visiting other countries. A number of transport types may have been used.

71% of visitors from Australia stayed in a hotel during their trip, while just over a third (38%) stayed in a guest house or B & B. Visitors from Australia showed a higher tendency to also stay with friends and family than other markets.

Summary



6. Activities, events, attractions, food and drink

99% of visitors from Australia to Scotland visited at least one type of attraction.

93% participated in at least one type of activity on their trip.

55% took part in at least one food and drink experience.

32% participated in at least one type of event.

Summary



7. Holiday satisfaction and likelihood to return

48% of visitors from Australia rated their holiday in Scotland as a perfect 10 out of 10 experience.

70% rated their experience as 9 or 10 out of 10.

77% are likely to recommend Scotland (9 or 10 out of 10).

44% said they are quite likely or very likely to return to Scotland in the next five years.



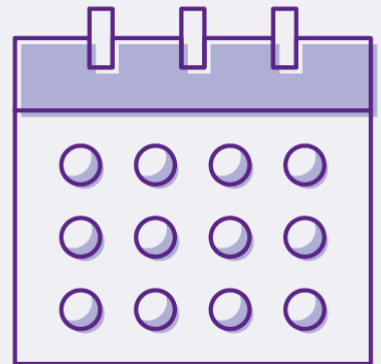
1. Definitions used within this report

Within this report where we explore aspects of planning and booking, we refer to the use of “travel intermediaries”.

Travel intermediaries refer to a range of types of organisations that resell tourism products onto end consumers. They may sell individual products (such as hotels, travel or activities) or they may sell packaged products which include all or some of these elements.

Broadly travel intermediaries include travel agents, tour operators, online marketplaces and price comparison websites.

More detail on the definitions used within this report is contained at the end of this report.



2. Definitions used within this report

All types of travel intermediaries

Travel agents who offer advice through personal interaction, such as high street shop or telephone (e.g., TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT)

CODE

3

Personal travel agent or advisor (someone who creates bespoke tailor made holidays specifically for you)

4

Online only travel agents who offer a wide range of travel deals online, such as flights, accommodation, car hire, etc. (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

5

Online tour operators (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

6

Online marketplace – a website or app that connects the traveller with accommodation and experience providers directly (e.g., Airbnb, VRBO)

7

Price comparison websites – a website or app that aggregates travel deals, such as flights and accommodation, from other sites (e.g. Skyscanner, Kayak.com, Priceline.com, lowestfare.com)

8

Peer review websites – a website or app that collates reviews from other travellers (e.g. TripAdvisor)

9

Specialist travel agents or tour operators who focus on specialist interest travel and tours, e.g., golf, walking, cycling, cruises

10

Market specific examples in the questionnaire:

Code 3 – Travel agents

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

Code 5 - Online Travel agents

- Germany – Booking.com, Expedia, HRS
- France – Booking.com, Expedia, Voyage Privé
- Spain - Logitravel, eDreams, Booking.com
- Italy – Expedia, eDreams, Booking.com
- All others - Booking.com, Expedia

Code 6 – Online tour operators

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

3. Accommodation definitions used within this report

Serviced accommodation:

Hotel/Motel/Inn

Restaurant with rooms

Guest House/B&B

Serviced Apartment

Non serviced accommodation:

Self catering accommodation (whole of property or unit)

Friend's or relatives homes

Rental of private home (room only)

Second home or time share

Caravan, camping and glamping

Private home:

Staying with friends/relatives

Rental of a room in someone's private home

Second home

Caravan, camping and glamping:

Campervan or motorhome

Camping (campsite or wild)

Touring or Static Caravan

Glamping or alternative accommodation

All 'other' accommodation types are not included in the above nets i.e. hostel, farmhouse, other.



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