In summer 2019, VisitScotland conducted exploratory consumer research among active outbound holidaymakers from the three largest cities in mainland China. The research explored holidaymakers’ aspirations, motivations, planning and booking behaviour related to overseas leisure trips, as well as their perceptions of Scotland. The research participants were travellers aged 25 to 45 who have a propensity for long haul trips outside of Asia. A group of recent Scotland visitors were also included to find out their holiday experience in Scotland. Combined quantitative and qualitative methodologies were used in this research.

**HOLIDAYMAKERS ARE MOTIVATED BY**

**SEEKING QUALITY TIME IN NATURAL BEAUTY**
- 92% Coastlines and islands
- 92% The great outdoors
- 91% Lakes, mountains and grasslands

**SOAKING UP THE LOCAL CULTURE**
- 94% Eating local delicacies
- 90% Visiting historical sites and traditional buildings
- 87% Shopping for souvenirs and local products

**GETTING AWAY FROM IT ALL**
- 93% Spending quality time with family and friends
- 91% Improving physical and mental wellbeing
- 89% Escaping everyday routine
- 77% Switching off and relaxing

**PLANNING AND BOOKING**

**ONLINE TRAVEL AGENCIES, TRAVEL REVIEW SITES AND SOCIAL MEDIA**
play an important role in the planning and booking stages

**BOOKING**
- 63% Online travel agency
- 37% Website or mobile app of a tour operator
- 23% Local tourist information centre
- 23% Purchased tickets in person at the venue on the day

**PERCEPTIONS OF SCOTLAND**

**WHAT PEOPLE ASSOCIATE WITH SCOTLAND**

**THOSE STILL TO VISIT**
- Bagpipes, castles, kilts and whisky

**THOSE WHO HAVE VISITED**
- Bagpipes, castles, whisky, nature, wildlife, escapism, outdoor activities and friendly locals
VISITOR EXPERIENCE IN SCOTLAND

WHAT INSPIRES OUR VISITORS

33% Iconic sights and tourist attractions
29% Specific interest such as whisky, golf or film
26% Online videos
29% Information from offline travel agents
26% Travel guidebook
25% Information from official destination websites
31% Read something on social media
26% Travel website/apps

SCOTLAND IS A PART OF A WIDER UK TRIP FOR MOST VISITORS

MOST POPULAR DESTINATIONS
Edinburgh, Glasgow, The Highlands and The Loch Lomond area

HOTELS ARE THE MAIN TYPE OF ACCOMMODATION
87% stayed in hotels, over half chose 5-star or 4-star hotels and 20% used Airbnb

TOP ACTIVITIES

Viewing ancient and traditional buildings and artefacts
Visiting lakes, mountains and grasslands
Shopping for high-end goods, souvenirs and local products
Experiencing gourmet and luxury foods
Experiencing coastlines and islands
Trying local delicacies

Unexpected experiences that wowed visitors

Attending events
Visiting art exhibitions
Seeing wildlife in its natural habitat
Road tripping
Experiencing some adventure or thrill
Meeting new people

LIKELIHOOD TO RETURN

87% said they would like to return to Scotland in the next 2 years

CONTACT DETAILS

Sample Base: visitors n=541