THE SCOTLAND VISITOR EXPERIENCE IN 2021

ONLINE RESEARCH WITH VISITSCOTLAND UK AND IRELAND CUSTOMERS

(8 SLIDES)

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ABOUT THIS STUDY

• VisitScotland regularly conducts research amongst its customers from the UK and Ireland, to explore their travel decision making and trip experiences, as well as holiday satisfaction and future visit intentions.

• **This report focuses on those VisitScotland customers who took a holiday or short break in Scotland in 2021 since the re-opening of tourism on 26 April 2021.**

• The aim of this research is to provide consumer insights to enable VisitScotland to continue to support the recovery of the tourism industry and focus on sustainable growth that will enhance the positive benefits of tourism for all.

• The research was conducted via an online survey in January 2021 with VisitScotland customers. It is therefore not representative of all those who may have taken holidays or short breaks in Scotland during 2021. An independent research agency Progressive Partnership Ltd conducted the fieldwork and data analysis.

• Key topics include visitor behaviour and trip characteristics, motivations to visit Scotland, the planning process, transport, accommodation, areas visited, activities conducted, satisfaction
The survey explored the holiday behaviours and views of UK and Ireland consumers who have engaged with VisitScotland marketing communications.

They may have used the VisitScotland.com website, opted in to the VisitScotland consumer database via paid campaigns or engaged with VisitScotland via another channel, such as VisitScotland official Facebook, Twitter or Instagram pages. Many are loyal and repeat visitors to Scotland.

The findings do NOT therefore represent a nationally representative sample.
SUMMARY: HOLIDAY MOTIVATIONS

• Many visitors in 2021 were motivated because they were looking for an escape, to get away from it all, to connect with nature and to avoid crowds. There was also a desire to go somewhere safe and familiar.

• Motivations for taking a holiday varied by visitor type, with first-time visitors more likely to be looking for an adventure or challenge and/or wanting to learn something new. Scotland visitors (residents) were more likely to say that they want to travel to support Scotland tourism businesses than non-resident Scotland visitors.

• The key attributes of a holiday in Scotland continue to align with what people are seeking. Although the importance of pandemic related considerations will likely diminish in 2022, the desire to get away from it all will continue to be an important decision factor.
SUMMARY: VISITORS – HOLIDAY BEHAVIOURS (1)

- **Planning and booking:** People who booked paid-for accommodation tended to either book directly with their accommodation provider, or through an online travel website/app. The most important factor when booking accommodation was user generated reviews of accommodation, with covid safe accreditation a less significant factor.

- **Areas visited:** The Highlands and Skye area was by far the most visited area, reflecting the desire expressed by many to get away from it all and connect with nature and the outdoors. This was underlined by both the type of destination, and the main activities undertaken: visitors most commonly spent time in rural coastline/island destinations and spent time on short strolls, visiting beaches, and going on longer hikes.
SUMMARY: VISITORS – HOLIDAY BEHAVIOURS (2)

- **Accommodation:** The majority opted for non-serviced accommodation, with a third staying in self-catering and a quarter camping or caravanning, although the single most common accommodation type was a hotel/motel/inn.

- **Transport:** Most visitors from England travelled by car or campervan, although those travelling by train has increased since 2020.

- **Activities:** Tended to be outdoor related, walking and enjoying outdoors and wildlife. Visiting historical and cultural attractions have returned to pre-pandemic levels.

- **Satisfaction:** There were high levels of satisfaction with most aspects of trip experience, with more than nine in ten visitors reporting they were satisfied with the welcome of local people, the quality of hygiene measures (at accommodation and in other venues/shops), and the cleanliness of the environment.
SUMMARY: FUTURE INTENTIONS

• Seven in ten respondents reported it was very likely they would take a holiday or short break in Scotland in 2022

• Rural locations, such as the Highlands, islands and the west coast were the most popular

• Even amongst non-visitors, almost three quarters said it was very or quite likely that they would take a holiday in Scotland this year

• Very high levels of intention – could visits during the pandemic, prompted by overseas travel restrictions, have reminded domestic visitors of what Scotland has to offer as a destination?
CONTACT US

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