An Overview of Our Target Segments
Background

The main purpose of VisitScotland’s segmentation model is to help optimize marketing spend and target communications at the right consumers within the UK for all marketing channels.

VisitScotland first conducted a large scale consumer research programme to develop an accurate and detailed picture of the UK visitor market back in 2006. This research was used to build a segmentation model to understand and target UK consumers which has been used to inform VisitScotland’s UK marketing strategies and activities to date.

Why Change to a New Segmentation Model?

Consumer behaviour is constantly changing and any segmentation model must evolve to take into account the important consumer trends affecting behaviour. In 2006 when the original VisitScotland segmentation was created, online behaviour was nowhere near as prevalent as it is today. Smartphones had only just been invented, there were no tablet computers and social networking was in its infancy. More importantly, very few consumers were using travel review websites to help them plan and book their holidays and short breaks. These trends have been moving quickly, even since the segmentation model was last refreshed in 2010.

In 2013/14, VisitScotland decided to re-build the segmentation solution for the UK marketplace from first principle, taking into account all the latest changes in consumer behaviour.

Research Programme

A detailed research programme gaining information from over 13,000 UK consumers began in 2013 and ran throughout the first half of 2014.

To find out more about UK consumers general holiday taking behaviours, please download the Topic Paper (November 2013) which details the results from the first stage of the research: www.visitscotland.org/pdf/Insights%20UK%20Consumer%20Behaviour%202013%20final.pdf

Why Segment?

Market segmentation is a marketing tool that offers the chance to break down a specific market into groups or segments of individuals with shared needs or behaviours in order to better target them.

Traditional tools often define consumers purely by demographic or life stage variables that assume everyone in one age group acts in a similar way. Segmentation offers the chance to research in more depth the wants and needs of consumers as well as their specific behaviours, alongside demographic and life stage information.

Understanding customers in depth means VisitScotland can ensure marketing campaigns reach consumers in the best way whether it is through TV or radio advertising, direct mail or sales promotions. There are a number of methods of segmenting a target population. VisitScotland’s segment model is based on a behavioural approach, based on people’s holiday motivations and behaviours, attitudes towards Scotland as a holiday destination and their use of media channels.

The new model identifies 10 UK segments. VisitScotland have identified 5 segments which it believes will provide the best return on investment. Information on these segments will be used to guide VisitScotland’s UK marketing.

Read on to find out more about:

- Adventure Seekers Page 2
- Curious Travellers Page 6
- Engaged Sightseers Page 10
- Food-Loving Culturalists Page 14
- Natural Advocates Page 18
Adventures Seekers
(1.2million UK households, 9% of target UK households)

“Adventures Seekers want an active holiday where they can enjoy both outdoor and cultural activities. They will venture off the beaten track and will be engaged by trying new things and pushing their limits and experiences. Holidays will really energise them”

Personality:
They are typically energetic, sociable, career minded individuals with an urban outlook. They have a real sense of ‘get up and go’. Not only are they active in their leisure time, they also have an adventurous outlook and some will be real thrill seekers.

At home, some Adventures Seekers will have an interest in a sporting activity, perhaps running, cycling, water sports and so forth.

Many will enjoy a network of friends who share their passion for a sport or an activity and they will enjoy sharing experiences with their friends and networks.

Profile:
Affluent

Typically a younger age profile than other segments but there will be a spread in other age groups

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<th>Age Group</th>
<th>Percentage</th>
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<tr>
<td>Under 35</td>
<td>55%</td>
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<td>35-54</td>
<td>38%</td>
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<tr>
<td>Over 55</td>
<td>7%</td>
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Majority live across England 81%.

13% are based in Scotland.

Key areas include:
London 26% and the South 9%
North 23%
Midlands 12%

Segment most likely to have children at home: 32%
Likely to be working full time: 68% (above average)
Students: 8% (above average)
Retired: 2% (below average)

Holiday Profile:
Adventures Seekers are above average holiday takers, with a combination of both trips abroad and domestic breaks.

In terms of domestic breaks, destinations in England are particularly accessible to them and their consideration list of domestic destinations is wide.

Total Annual Holiday Nights

1. 55% will be abroad
2. 33% rest of UK
3. 12% Scotland
Adventure Seekers think Scotland is best for:

- 13% ‘the main holiday of the year’
- 20% ‘a longer holiday (a week or more) but not the main holiday of the year’
- 67% ‘a short break of 1-6 nights’

Top 3 Factors When Choosing a Holiday Destination for Adventure Seekers:

1. Breathtaking scenery & landscape
2. Lots of new and interesting things to discover
3. Great range of outdoor activities

Accommodation Preferences:

Adventure Seekers will use a variety of accommodation types & quality to suit their holiday needs, which may include a mix of city, rural or coastal stays.

They are more likely than other segments to go camping or to use hostels. And they are more likely to use a mix of different quality in one trip or state that the quality of where they stay is not important to them. For some the activity will be the most important aspect of their break, rather than their accommodation choice.

<table>
<thead>
<tr>
<th>Usual Choice of Accommodation in UK</th>
<th>% Above or Below Average</th>
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<tbody>
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<td>Hotels</td>
<td>57%</td>
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<tr>
<td>Self-catering</td>
<td>42%</td>
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<tr>
<td>B&amp;B</td>
<td>40%</td>
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<tr>
<td>Camping</td>
<td>36%</td>
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<td>Staying with friends &amp; relatives</td>
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<td>Guest House</td>
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<td>Caravan</td>
<td>13%</td>
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<tr>
<td>Hostel</td>
<td>11%</td>
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Holiday Activities:

This segment likes to pack a lot into their holidays and they like to participate in a range of activities from sports and outdoor adventures to cultural activities.

**Adventure sports** will appeal but they also enjoy visiting natural sites and taking in the landscape via walking, hill climbing or cycling. They will enjoy **cultural activities** (visiting castles, monuments, museums, and TV and film locations). If they take in a city during their break, they will typically be ‘on the go’ and will enjoy the outdoor urban environment as well as cultural activities.

They tend to reject holidays which are just for relaxation or involve ‘staying put’ or staying indoors.

For some Adventure Seekers, participation in active events such as **marathons** and **extreme races** will appeal to their drive and competitive nature. Activities which challenge them and give them something to talk about with their network of friends or sports enthusiasts will appeal.

“Somewhere we can go diving or snorkelling, nice terrain to go for walks, sightseeing, historic things...not waterparks or nightclubs”

“We need lots of space and lots of outdoor activities”
Technology & Media:

Adventure Seekers are typically early adopters of mobile and new technology and are very confident users of the internet and social media. Key online activities for Adventure Seekers include social networking, consulting maps, route planning, weather forecasts and looking for practical information.

They also use a wide mix of offline and online sources for holiday inspiration and trip planning. Recommendations from friends and family are of particular importance to this segment. Travel review sites and travel books/guidebooks/brochures are also key sources for holiday planning. Looking at photos and social media posts from friends provides inspiration for destination choice, more so for Adventure Seekers than other segments.

The internet is also important for planning activities, checking weather and transport options when on holiday and hence Adventure Seekers will be keen on using Wi-Fi whilst they are away.

### Technology & Media Summary

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<th>Activity</th>
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<tr>
<td>Heavy internet users</td>
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<tr>
<td>Light television viewers</td>
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<tr>
<td>Watch Video on Demand</td>
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<td>Heavy cinema goers</td>
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<td>Heavy/medium quality news readers</td>
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<td>Read e-versions of newspapers</td>
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<td>Medium/light commercial radio listeners</td>
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Relationship with Scotland:

Adventure Seekers are interested in Scotland as a domestic destination, particularly for Scotland’s breathtaking scenery and unspoilt nature.

“55% think Scotland is the best part of the UK for a holiday or short break” (above average)

“80% feel they will spend more time on holidays or short breaks in Scotland in the next 3 years” (above average)

Connections with Scotland are above average (61%), particularly via good friends living in Scotland or having travelled to Scotland on business.

A number of Adventure Seekers will be regular visitors to Scotland (18%), but typically the largest proportion are those that have not been to Scotland yet but would like to visit (35%), or have been once or twice before and would like to visit again (34%).

“Anything from going to the beach to throw a Frisbee to manmade mountain trails for the bikes”

“It’s important to be digitally connected but not 24/7”

“We’re not really go and lie on the beach in the sun people. We want a mix of things to do”
Challenges:

There is a **general lack of knowledge** of what Scotland has to offer amongst some Adventure Seekers, which may be related to the younger profile of the segment or a lack of product knowledge.

“39% feel they have a good knowledge of Scotland as a holiday destination” (below average)

**Unreliable weather** may be a barrier to some and the perception that it can be difficult to get to your destination in Scotland is above average.

How the Tourism Industry Can Help:

Give Adventure Seekers lots of ideas on how to be active during their break in Scotland, including the variety of ways to enjoy and experience the outdoors. They will enjoy scenery, nature, urban and rural outdoors, cultural activities and experiences which will challenge them or appeal to their sense of adventure. When communicating to Adventure Seekers, provide information and inspiration to build their knowledge of Scotland’s product and experiences and give them something to talk to their network of friends about.

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**Advisement:**

VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions.

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Curious Travellers
(1.9 million UK households, 14% of target UK households)

“Curious Travellers like to live life to the full and enjoy traveling as a hobby. They have an overwhelming desire to explore new destinations and discover new things. A holiday will often broaden their minds, educate and revitalise them”

Personality:
Curious Travellers have a great curiosity about the world and look to broaden their minds by trying new things. They are typically free spirits who enjoy living life to the full. Their love of travelling may have come from experiences in their youth.

At home, they will continue their passion for travel by reading regularly on a variety of topics. Specialist travel, wildlife and Geography magazines are of interest, allowing them to learn more about the world. Travel books and guide books are often used.

Curious Travellers will lean towards more cultural hobbies and interests. The underlying attribute is a genuine openness towards learning new things.

Mainly adult only households
Only 25% have children at home

Likely to be working full time: 53% (average)

Students: 4% (average)

Retired: 18% (average)

Holiday Profile:
Curious Travellers are above average holiday takers, spending more nights away than the average person and most of these nights are currently taken in destinations abroad.

Their holiday consideration set operates from a global view on life, with accounts for their bias towards global destinations.

Therefore, competition for their holiday nights is fierce but domestic trips do still appeal. At the moment, they are spending below average number of nights and spend in Scotland.

Profile:
Affluent

A real spread of ages, concentrating on the middle to upper age bands.

43% fall into the 25-44 age group
25% within the 25-34 age group
31% 55+

Majority live across England 81%
11% are based in Scotland

Key areas include:
London 23% and the South 7%
North 23%
Midlands 14%

Total Annual Holiday Nights

1 70% will be abroad
2 22% rest of UK
3 9% Scotland
Curious Travellers think Scotland is best for:

- 8% ‘the main holiday of the year’
- 23% ‘a longer holiday (a week or more) but not the main holiday of the year’
- 69% ‘a short break of 1-6 nights’

Curious Travellers are likely to spend their main holiday of the year overseas. There is an opportunity to encourage Curious Travellers to explore Scotland for a short break.

Top 3 Factors When Choosing a Holiday Destination for Curious Travellers:

1. New and interesting things to discover
2. Breathtaking scenery and landscape
3. Fascinating history & culture

Holiday Activities:

A holiday or break for the Curious Traveller will pack a lot in; exploring the **history and culture** of destinations; enjoying scenery and landscapes; getting off the beaten track and trying new things which all appeals to their **natural curiosity**. Enjoying the outdoors via hiking, rambling or short walks and taking in natural sites (e.g. waterfalls, caves) are also activities they will relish.

Some Curious Travellers may well have a ‘**bucket list**’ of destinations and may enjoy ticking places off their destination list.

Curious Travellers are prone to putting themselves out there and **revel in new experiences** that are authentic, unique and not always mainstream.

They tend to reject holidays which involve going back to the same place or doing the same thing. Therefore it is crucial to communicate to Curious Travellers all of the interesting things about a destination, both presenting a destination in new ways and showcasing a range of new experiences to them.

Accommodation Preferences:

Curious Travellers will use a variety of **accommodation** types and quality to suit their holiday needs, which may include a mix of rural, city and coastal stays. Hotels, B&Bs and self-catering are the most popular choices.

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“I’m very much into culture and history and theatre. I go to places to immerse myself in the culture and the historical side”

“With so many great places to visit in the UK and abroad it seems wasteful to constantly go back to the same one each time…so we tend to go somewhere different each time”

“We go and visit interesting places..I usually have a list”
Technology & Media:

Curious Travellers have embraced mobile and new technology, spending slightly more time on average on the internet than the average adult.

Curious Travellers will use a mix of offline and online sources for travel inspiration and trip planning; particularly travel books, guidebooks and recommendations from friends and family. Online review sites are also important in the holiday planning process.

In terms of trip planning, they are often more interested in what they will do when they get to their destination rather than the practicalities of arranging the trip. They are more likely to book things once they get to where they are going.

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At home, Curious Travellers typically watch quality dramas, sport, news and current affairs shows and light entertainment programmes. They delight in keeping up with world events. Around 76% will have an active social media account.

Relationship with Scotland:

Curious Travellers are interested in Scotland, particularly for its scenery, unspoilt nature, history and culture. They believe Scotland has new and interesting things to discover. A large proportion feel Scotland is on their destination list.

“76% feel they will spend more time on holidays or short breaks in Scotland in the next 3 years” (slightly above average)

“55% think Scotland is the best part of the UK for a holiday or short break” (slightly above average, but the lowest score for the target segments)

But Curious Travellers have less self-claimed knowledge of Scotland and their connections are less strong than other segments. Their connections are mainly via doing business in Scotland or ancestral links, rather than from having friends currently living in Scotland (which is below average).

42% feel they have a good knowledge of Scotland (average)

43% feel they have no connections with Scotland (average)

There will be some Curious Travellers who are regular visitors to Scotland (14%) or occasional visitor (18%). But the largest proportion are those that have not been to Scotland yet but would like to visit (28%), or have been once or twice before and would like to visit again (40%). This represents a good potential opportunity to engage with Curious Travellers to showcase Scotland as a range of destinations or experiences which should be on their bucket list.

“I’ve never been to Scotland, it’s on the list but it never gets to the top of the list because I think...ohh I could go to Morocco for the same price or I could go to Egypt or Tunisia and it’s definitely going to be warmer there”
Challenges:

Curious Travellers tend to dislike returning to the same place or destination and their global view and curiosity means competition for their holiday nights is fierce. Showcasing Scotland as a range of regions and unique experiences offers an opportunity to present more than just one place for their bucket list.

“However’s available we’ll take part. I don’t say no to anything”

How the Tourism Industry Can Help:

Curious Travellers will relish lots of ideas on how they can get under the skin of the history of a local area and the local culture. Showcase what Scotland has to offer in terms of the experiences which will let them try out a new skill, try a new activity or learn about local myths, legends and cultures. Hidden gems and opportunities which may not be deemed the mainstream activities can appeal to their curious nature. Consider talking about Scotland and your region within their global horizons.
Engaged Sightseers
(1.0 million UK households, 8% of target UK households)

“A love of holidays drives Engaged Sightseers to plan numerous breaks in a year. They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out an authentic experience”

Personality:
They are typically down to earth individuals who may be quite ‘traditional’ in their outlook and fairly settled in their lifestyles. They may be cautious in some ways, for example when providing personal data to companies or when sharing financial data over the internet.

There are friendly individuals and enjoy chatting to people when the opportunity arises and getting involved with their local community.

Although they may have a cautious nature in some aspects of their lifestyle, there is a confidence amongst Engaged Sightseers. They are open to trying new things, within acceptable limits!

Many will have time available to them and planning and going on holidays throughout the year is a key aspect of their lives. They enjoy taking the time to plan their holidays.

Profile:
Mid affluence (below average)

An older age profile than other segments; typically over 45 and with the highest proportion falling into the over 65 age group of all the segments (27%)

Majority live across England 79%
13% are based in Scotland

Key areas include:
North 26%
London 16%
Midlands 13%

Mainly adult only households. 16% have children at home (below average)

Likely to be working full time: 38% (below average)
Retired: 37% (above average)

Holiday Profile:
Engaged Sightseers are above average holiday takers, taking the highest number of nights away on holiday per year of all the segments. They will take a combination of both trips abroad and domestic breaks. In terms of domestic breaks, destinations in England are particularly accessible to them and their list to consider of domestic destinations may be extensive.

Some Engaged Sightseers may have a routine of going back to a place they are familiar with (especially abroad), but in terms of domestic breaks, they are more open to visiting new places and trying out new things.
Total Annual Holiday Nights

1. 55% will be abroad
2. 30% rest of UK
3. 15% Scotland

Engaged Sightseers think Scotland is best for:
18% ‘the main holiday of the year’
26% ‘a longer holiday (a week or more) but not the main holiday of the year’ (above average)
56% ‘a short break of 1-6 nights’

Top 3 Factors When Choosing a Holiday Destination for Engaged Sightseers:
1. Breathtaking scenery and landscape
2. Fascinating history & culture
3. New and interesting things to discover

“Theres so much going on in Scotland and its my kind of going on”

“I’m looking for the history, the culture, the scenery, walking, hiking, looking at old buildings…”

Holiday Activities:
A love of holidays, and the time to take them, is at the heart of this segment. They particularly enjoy spending their UK holiday time touring and general sightseeing. Historical places are of great interest as well as scenery, nature and wildlife. They will enjoy visiting castles, monuments, parks and gardens, museums and galleries. Short walks will appeal but typically they will not participate in more active sports.

The traditional coach tour or self-driven tours appeal to Engaged Sightseers. They will enjoy exploring beyond the whistle stop tourist route to seek out an authentic experience which they can tell their friends and relations about. For example, they may enjoy engaging with the local community of the area, finding the locals bar and chatting to the local people and seeking out local food. They will enjoy engaging with the local culture and participating, rather than just observing.

They tend to reject holidays which are too adventurous or thrill seeking and take them away from their comfort zone.

Accommodation Preferences:

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<td>Camping</td>
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<td>Hostel</td>
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Having the highest number of holiday nights per year, a range of accommodation types and quality may be used during a trip to suit their needs and budgets. Medium quality (3-4 stars) is widely used; high quality (4-5 stars) will be used on occasion.
Technology & Media:

Engaged Sightseers are online but can be considered as ‘followers’ rather than early adopters of new technology. They are cautiously engaging with mobile and new technology but so far have the lowest smartphone penetration of the target segments.

67% do have an active social media account but their activity is mainly focused on sharing with friends and family via Facebook, rather than engaging with brands or using a variety of social media platforms.

They will use a range of offline and online sources for both holiday inspiration and planning, including travel books/brochures, country tourism websites and review sites. Recommendations from close family and friends is also an important source of inspiration.

This segment may spend the least time online of the target segments, but they do recognise the internet as a key tool to help with their holiday planning. Hence, the majority of planning will be done online, but ‘trusted’ or well-known websites will be used. They may also be more cautious when considering giving personal data to organisations, than other segments.

At home, Engaged Sightseers enjoy watching ITV dramas (especially crime), nature and wildlife shows, sport and light entertainment.

Relationship with Scotland:

Engaged Sightseers have a very positive view of Scotland as a domestic destination, thinking Scotland is ‘their kinda place’. 48% feel they have a good knowledge of Scotland as a holiday destination (which is above average) and a high proportion feel they would recommend Scotland as a holiday destination (40%).

However, whilst some are regular visitors to Scotland (21%) or occasional visitors (16%), there are many who have been to Scotland but not returned for a number of years (44%). This offers an opportunity to encourage these people to return to Scotland and re-engage with what Scotland can offer.

“58% think Scotland is the best part of the UK for a holiday or short break” (above average)

“77% feel they will spend more time on holidays or short breaks in Scotland in the next 3 years” (above average)

“We try not to be too touristy and to mix with the locals”

“We’re not too bothered about gourmet as long as we’ve got something tasty and traditional from the area”

“Two of my ambitions are to see puffins and otters and I thought Scotland would probably tick off both of those, but it’s just such a long way away”
Challenges:

Taking a high number of holiday nights per year, Engaged Sightseers may be more price sensitive than other segments. The perception of distance is also a barrier for some, especially when considering domestic destinations on their doorstep in England.

How the Tourism Industry Can Help:

Engaged Sightseers will enjoy engaging with your business and finding out what’s going on in the area. Signpost opportunities where they can have an authentic experience and engage with the local people. They may be touring around Scotland or keen to travel to other locations within your local region. Provide information to them on how to get around and the key historical, scenic and wildlife attractions in your region and possibly other regions of Scotland. When communicating with Engaged Sightseers consider ways to inspire them with new things to discover and opportunities throughout the year.
Food-Loving Culturalists
(1.6 million UK households, 12% of target UK households)

“Food-Loving Culturalists will seek out a relaxing holiday experience where they can enjoy great food and drink and engaging cultural activities. They enjoy short breaks in the UK and will recommend quality experiences when their host has gone the ‘extra mile.’”

Personality:
They like to be seen to be influential amongst their friends and are typically, professional, career minded and discerning individuals. They have a lower sense of adventure and may be less active or sporty than some other segments.
A passion for food and drink is an important part of their lifestyle. At home, some Food-Loving Culturalists will be keen chefs and some will enjoy following their passion via reading specialist magazines and watching food and drink programmes. Many will also really enjoy taking the time to plan their holidays.

Profile:
Most affluent of the UK segments
Typically 25-54 (71%), although there will be a proportion who are over 55

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<td>40%</td>
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Majority live across England 81%
15% are based in Scotland

Key areas include:
London 25% and the South 9%
North 21%
Midlands 14%

Mainly adult only households: 21% are likely to have children at home (below average)
Likely to be working full time: 65% (above average)
Retired: 14% (below average)

Holiday Profile:
Food-Loving Culturalists are above average holiday takers and are the highest spenders on annual holiday nights of all the segments.
They enjoy spending time and money on holidays abroad to both long haul and European destinations. UK breaks are centred on short breaks, and in particular city based breaks, although they are also open to rural breaks.
This segment will consider jetting off to a European city or European location for a weekend or a short break, so competition is fierce and destinations must try to grab their attention.

Total Annual Holiday Nights

1 58% will be abroad
2 30% rest of UK
3 12% Scotland
Food-Loving Culturalists think Scotland is best for:
8% ‘the main holiday of the year’
18% ‘a longer holiday (a week or more) but not the main holiday of the year’
73% ‘a short break of 1-6 nights’

Top 3 Factors When Choosing a Holiday Destination for Food-Loving Culturalists:
1. Great food and drink experiences
2. Fascinating history and culture
3. Breathtaking scenery and landscapes

Holiday Activities:
This segment will seek out great food and drink experiences at a destination; they may have prior knowledge of these before they arrive from their general interest.

Whilst food and drink is of vital importance to their enjoyment of a destination, it is not the ‘driving force’ behind the destination choice. They are likely to pick a place to suit their holiday needs and then they will look for the food and drink experiences which will maximise their enjoyment of the destination. It’s not necessarily all 5 star dining, but very much about good quality and authentic food and drink experiences.

Cultural activities are also of great interest and they will enjoy visiting castles/historic properties, short walks, visiting museums and galleries, sightseeing and parks and gardens. Special exhibitions, events or openings may also appeal.

Accommodation Preferences:
Top end accommodation appeals to this segment. They will aspire to 4 and 5 star, mainly hotels and also B&Bs/self-catering accommodation. In reality, mid-range accommodation will also be used when needed.

This segment is the most likely segment to agree with the statement ‘I’ll happily pay more to upgrade to better accommodation’.

<table>
<thead>
<tr>
<th>Usual Choice of Accommodation in UK</th>
<th>% Above or Below Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>79%</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>40%</td>
</tr>
<tr>
<td>Self-catering</td>
<td>37%</td>
</tr>
<tr>
<td>Staying with friends and relatives</td>
<td>26%</td>
</tr>
<tr>
<td>Guest House</td>
<td>18%</td>
</tr>
<tr>
<td>Camping</td>
<td>9%</td>
</tr>
<tr>
<td>Caravan</td>
<td>7%</td>
</tr>
<tr>
<td>Hostel</td>
<td>4%</td>
</tr>
</tbody>
</table>

Quality, value added, exclusive experiences appeal and they are likely to offer praise or recommendations when they feel the host has gone the extra mile for them.

“Food is critical….it really casts a shadow if you can’t find anything special, because a holiday is a treat so you want everything to be a bit special”
Technology & Media:

Food-Loving Culturalists embrace technology and are above average users of the internet and social media. 82% currently have an active social media account. They have a particularly high use of travel review sites, for holiday planning and also for contributing their own reviews.

The majority of trip planning will be via the internet. However, they will also seek inspiration from magazine subscriptions and travel supplements. Although an affluent segment, there are also very savvy and hence some will be using discount deals and offers via the internet in their holiday planning.

Specific recommendations from friends and family are also important for inspiration.

In terms of television viewing, this segment enjoys watching cooking/foodie shows, lifestyle programmes (especially about property or technology/gadgets) and quality drama and comedy.

<table>
<thead>
<tr>
<th>Technology &amp; Media Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy internet users</td>
</tr>
<tr>
<td>Light television viewers</td>
</tr>
<tr>
<td>Heavy cinema goers</td>
</tr>
<tr>
<td>Heavy/medium quality news readers</td>
</tr>
<tr>
<td>Light popular news readers</td>
</tr>
<tr>
<td>Read E versions of newspapers</td>
</tr>
<tr>
<td>Medium/light commercial radio listeners</td>
</tr>
</tbody>
</table>

Relationship with Scotland:

Many Food-Loving Culturalists feel they have a good connection with Scotland, often via doing business here and having good friends living in Scotland. Many feel they have a good knowledge of Scotland (53% which is above average).

“57% think Scotland is the best part of the UK for a holiday or short break” (above average)

“84% feel they are likely to spend more time on holiday in Scotland the future” (above average)

“69% feel they have some connection to Scotland (above average)

Whilst some are regular or occasional visitors to Scotland (43%), 40% have been to Scotland but not for a while. This provides the opportunity to promote Scotland’s current cultural experiences (including exhibitions and events) and food and drink hooks to continue to raise their interest and to ensure Scotland is in their short break destination list alongside European and long haul locations.

“We won’t go somewhere we know the food isn’t going to be good”

“I love Scotland, it’s one of my favourite places to visit. I think it’s probably one of the most beautiful countries I’ve ever been to….it ticks all the boxes for me”
Challenges:

A wide range of destinations are accessible to the Food-Loving Culturalists and competition for their holiday nights is very strong. In their destination choice, they will be considering the quality of the experience and weighing up the 'value' of a short break to Scotland versus a short break to a European, or even a long haul location.

Although Food-Loving Culturalists may take a mix of city and rural breaks, for some, the perception that getting around outside of the Scottish cities is difficult and time consuming, especially for a short break, is a consideration in their destination choice.

How the Tourism Industry Can Help:

Food-Loving Culturalists will be receptive to a range of food and drink experiences available in your area and will be interested in taking in quality cultural experiences, including special exhibitions, events and exclusive use or unique opportunities. Quality and value added experiences which really make them feel special will grab their attention and give them something to talk about. When communicating with Food-Loving Culturalists consider messages on transport options to demonstrate that getting to destinations in Scotland is easy, accessible and can be relaxing and form part of a quality short break.

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Natural Advocates
(1.1 million UK households, 8% of total UK households)

“Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breathtaking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time.”

Personality:
Natural Advocates are typically more introverted individuals who value peace and quiet. Confident in themselves and what they want out of life, Natural Advocates don’t follow the crowds. They pay great attention to detail and can be wary of providing their personal details to organisations.

Natural Advocates are less likely to consider themselves as adventurous, spontaneous, early adopters of new technology or being unaffected by the recession.

In the next 3 years, key life events include moving home (28%) or changing career (18%), or none (47%), for that matter, as they are quite settled.

Some Natural Advocates may have a dog and enjoy long walks in the country with their pet. Dog friendly hotels, restaurants, pubs and cafes can appeal.

Holiday Profile:
Whilst Natural Advocates take fewer holidays or short breaks in a given year, on average, when they do go away it tends to be to Scotland (71% of their nights away and 60% of their annual holiday spend). Therefore, Scotland is the main destination of choice for Natural Advocates.

However, proximity is not the driving factor. Scotland offers exactly what they want from a holiday: scenery, nature, history, culture and getting away from it all.

Profile:
Mid affluence

The majority fall into 35-54s.

Under 35: 19%
35-54: 46%
Over 55: 36%

59% live across England
35% are based in Scotland

Key areas include:
Central Scotland 21%
Northern Scotland 11%
Northern England 29%

Children living in their household 27%
(slightly below average)

26% have grandchildren (above average)

Likely to be working full time: 52%
(slightly below average)

Retired: 18% (slightly above average)

Total Annual Holiday Nights

1. 7% will be abroad
2. 22% rest of UK
3. 71% Scotland
Natural Advocates think Scotland is best for:

- 48% ‘the main holiday of the year’
- 16% ‘a longer holiday (a week or more) but not the main holiday of the year’
- 36% ‘a short break of 1-6 nights’

Top 3 Factors When Choosing a Holiday Destination for Natural Advocates:

1. Breathtaking scenery and landscapes
2. Relaxing place to unwind
3. Unspoilt nature

Accommodation Preferences:

Flexible accommodation is important for Natural Advocates. Rural and more remote locations will appeal. Self-catering in particular is well used (57%), as well as hotels (53%) and B&Bs (36%). 51% will use accommodation of medium quality and 22% will use 4-5 star accommodation.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Self-catering</td>
<td>57% ↑</td>
</tr>
<tr>
<td>Hotels</td>
<td>53% ↓</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>36%</td>
</tr>
<tr>
<td>Friends/relatives</td>
<td>23% ↓</td>
</tr>
<tr>
<td>Guest House</td>
<td>16% ↓</td>
</tr>
<tr>
<td>Caravan</td>
<td>15%</td>
</tr>
<tr>
<td>Camping</td>
<td>14%</td>
</tr>
<tr>
<td>Hostels</td>
<td>5%</td>
</tr>
</tbody>
</table>

Holiday Activities:

Their passion for and loyalty to Scotland is arguably the most distinctive feature of Natural Advocates. They really do feel Scotland is the best part of the UK for a holiday or short break.

Natural Advocates will enjoy being cut off from the world and getting away from it all.

They see holidays as a time for reflection and quiet time. Rigid itineraries and plans are avoided, given their preference for restorative and relaxing trips in Scotland. Holidays can often be a chance to spend time with close friends and family.

With their desire to get away from it all, rural and more remote locations can appeal. They tend to reject holidays which involve large amounts of hustle, bustle and people.

Gentle outdoor activities are favoured such as enjoying beautiful scenery and landscapes, walking (short walks and longer walks), visiting natural sites, watching wildlife, parks and gardens, sightseeing and visiting castles/monuments.

“This year we’re planning to stay in Scotland...get a cottage, somewhere up North, west coast maybe. Just somewhere there’s space to let the dog run, maybe do some walking.”

“It is pictures of barren Scottish nature that make me think ‘that’s where we should go’”
Technology & Media:

Natural Advocates are average users of the internet and social media. Facebook and Twitter are the two most common, however, 29% do not currently have a social media account, slightly higher than average.

They are more functional users of the internet with a focus on carrying out practical activities, compared with other segments, and can be described as ‘keeping up’ with internet usage trends rather than leading the way.

They enjoy planning holidays and will gain inspiration and information from a mix of offline and online sources (recommendations, official country tourism websites, travel books, review sites). Natural Advocates are the heaviest users of official country tourism websites.

Relationship with Scotland:

Their relationship with Scotland is the defining aspect of Natural Advocates and sets them apart from other segments. 74% recommend Scotland to others, 67% are regular visitors and 19% are occasional visitors. They see Scotland as best for the main holiday of the year (48%, which is well above average).

Of those living outside Scotland, they also have very good connections with Scotland. Good friends currently living here, definite Scottish ancestry, relations currently living in Scotland or they have previously lived in Scotland themselves.

Natural Advocates feel they know Scotland well. Self-claimed knowledge (82%) is double that of other segments. 95% intend to spend more time in Scotland in future.

They feel Scotland is different to other parts of the UK for a holiday or short break and feel they will be welcomed here. Reliable weather isn’t an issue for Natural Advocates.

“I think Scotland’s nature is spectacular. It would be a long time before I felt I needed to go abroad to see nature”

“My ideal holiday involved as few people as possible”

“There’s a huge variety of places and it doesn’t take very long to leave your house in Edinburgh and get out in the wilderness where there’s nobody around”
Challenges:

Few potential challenges to the loyalty of Natural Advocates. However, the most important thing is ensuring they do keep taking holidays and short breaks in Scotland and that Scotland continues to meet their needs.

Natural Advocates offer good potential to be used as advocates of Scotland and promoting Scotland via word of mouth and through their activity via social media. A key challenge will be to encourage this.

They perceive a trip to Scotland as offering good value for money. However, cost may be a challenge in future if prices were to rise significantly.

How the Tourism Industry Can Help:

Recognise that they know Scotland well and are spending time in Scotland to get away from it all. Try to ensure they have a relaxing time and take the hassle out of things for them. Signpost them to different walks they can do and natural sites they might not already have visited. Given their love of Scotland and experience, remember they are likely to come back and offer good potential for a repeat visit and the opportunity to recommend their experiences to others. Although they may know Scotland, they may not have visited everywhere, offering the opportunity to keep reminding them of the diversity of locations to visit.

Natural Advocates at A Glance

2014

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Appendix

Using and Interpreting Consumer Research

Please use the following as guidance notes with regards to the research programme which informed the development of the UK segmentation model:

Quantitative Online Survey
- Nearly 11,000 UK holiday takers took part.
- Respondents were a mix of people whose details were on the VisitScotland database or consumers sourced via a cold panel (a ‘cold panel’ being a research database of consumers who are willing to participate in research. They may or may not have any links to VisitScotland).
- Rejecters of Scotland as a holiday destination were excluded from the research.
- Results from the online survey were weighted against a UK representative omnibus survey (2,000 participants).
- The results can be described as a UK representative sample of non-rejecters of Scotland as a holiday destination.
- The fieldwork was conducted between June and July 2013 and focused on consumer behaviour in the past year (Jan-Dec 2012) and in the current year (2013). Specific questions were used to investigate current trends. The research data cannot be compared back to the 2006 research which informed the development of VisitScotland’s original 2006 UK segmentation model.
- Some questions focused on general holiday taking, others focused more specifically on Scotland

Additional qualitative research was conducted to verify key segment characteristics and to bring the quantitative data to life.

Q. How do the UK segments relate to the UK population?
There are 24.6 million UK households. From this total, rejectors of Scotland as a holiday destination and also non-holiday takers were excluded from the research and the definition of the target market population. The total target number of UK households used within the segmentation model was therefore 13.2 million households.

Q. Why exclude rejectors of Scotland from the research?
Rejecters of Scotland as a holiday destination were excluded from the model to allow us to focus on the households with greatest potential to consider Scotland as a destination. This allows us to have a segmentation solution that maximises marketing spend at targeting the right consumers. Rejecters are not likely to respond to marketing strategies on Scotland as a holiday destination.

Q. Is Ireland included in this segmentation model?
Northern Ireland was included in the research but no, the Republic of Ireland was not included in this UK segmentation model. VisitScotland uses a separate segmentation model for Ireland, based on research conducted in 2008. 3 segments are used to inform VisitScotland’s marketing activities for Ireland:
- Well-travelled Empty Nesters
- Busy City Dwellers
- Cautious Comfort