Scotland Visitor Survey
2015 & 2016
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Introduction
Survey objectives

to understand visitors to Scotland through the analysis of their behaviour and an understanding of their visitor experience

To Build Upon Other Research Statistics On Scotland’s Visitors
The most extensive Scotland visitor survey

**Stage 1**
Face-to-Face Survey in Scotland

- **11,743 visitors**

**Stage 2**
Online Survey

- **2,999 visitors**

**Fieldwork**
May – Sept 2015 & 2016

- **19 regions**

Methodology: overview
Methodology: overview

Jump Research on tour throughout Scotland
### Domestic – 75%
### International – 25%

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
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<td>England</td>
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<tr>
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<td>USA</td>
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<td>Canada</td>
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<td>Australia</td>
<td>2%</td>
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<td>Other long haul</td>
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*Note: data weighted to reflect GBTS/IPS proportions on international vs domestic visitors

Base: S1 All (11743)

Note: this is the profile of the survey sample only. For info on overall profile of visitors to Scotland use GBTS/IPS and Tourism in Scotland factsheet.
Before Trip

Glencoe, the highlands
Scotland’s scenery and landscape remains a key motivation to visit, as does its history and culture. Other drivers vary by market and visitor type.

What Attracts Visitors To Scotland?

Q10 Thinking broadly about your decision to choose Scotland for your holiday or short break, what was it that attracted you to spend your holiday / short break in Scotland on this occasion?  Base: S1 All (11743)
### What Attracts Visitors To Scotland by Market

#### Scot Residents

**Top 3 Core Drivers**
- Scenery & landscape (44%)
- Closeness to home (36%)
- To get away from it all (29%)

**Over-Index on:**
- Holidayed before & wanted to return (26%)
- Easy to get to (25%)
- Personal event / celebration (10%)

#### European Visitors

**Top 3 Core Drivers**
- Scenery & landscape (71%)
- History & culture (51%)
- A place I’ve always wanted to visit (41%)

**Over-Index on:**
- Visit cities (30%)
- Scotland’s reputation for friendly people (25%)

#### Rest of UK Visitors

**Top 3 Core Drivers**
- Scenery & landscape (46%)
- Holidayed before & wanted to return (29%)
- History & culture (26%)

**Over-Index on:**
- Visit family / friends (25%)
- Special event (12%)
- Personal celebration (11%)

#### Long Haul Visitors

**Top 3 Core Drivers**
- Scenery & landscape (53%)
- History & culture (52%)
- A place I’ve always wanted to visit (34%)

**Over-Index on:**
- My Scottish ancestry (23%)

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Top driver consistent for all markets, but other interesting differences also exist.
First Time Visitors

Top 3 Core Drivers
• Scenery & landscape (58%)
• History & culture (47%)
• A place I’ve always wanted to visit (42%)

Over-Index on:
• Visit cities (25%)

Repeat Visitors

Top 3 Core Drivers
• Scenery & landscape (47%)
• Holidayed before & wanted to return (32%)
• History & culture (29%)

Over-Index on:
• To get away from it all (25%)
• Visit family / friends (24%)
• Closeness to home (20%)
• Easy to get to (19%)
• Range of activities (15%)
• To visit a particular attraction (9%)
Word of mouth recommendation is an important factor, particularly for European, Long Haul and first time visitors, whilst Scot residents are motivated by a desire to holiday at home.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommended by friends / relatives / colleagues</td>
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<tr>
<td>Wanted to holiday at home rather than abroad</td>
<td>20%</td>
</tr>
<tr>
<td>Found a good deal / special offer</td>
<td>8%</td>
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<tr>
<td>Traveller review websites</td>
<td>6%</td>
</tr>
<tr>
<td>Price of hotels / accommodation</td>
<td>6%</td>
</tr>
<tr>
<td>Seeing something on social media about Scotland</td>
<td>4%</td>
</tr>
<tr>
<td>Price of airline tickets</td>
<td>2%</td>
</tr>
<tr>
<td>Direct advice from travel agent / tour operator</td>
<td>1%</td>
</tr>
<tr>
<td>Good exchange rates</td>
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</tr>
</tbody>
</table>

Scot residents are also motivated by deals and special offers (12%) and accommodation prices (8%). Travel review sites are influential even at early motivation stage, particularly for international visitors.

Q11 Which of the following persuaded you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (11743)
1 in 10 visitors were influenced by a travel feature about Scotland, whilst TV, film and books are also important prompts to consideration, especially for international visitors.

Q12 Did any of these prompt you to consider Scotland for this holiday/short break? Base: S1 All (11743)

- Travel feature about Scotland: 10%
- TV programme about Scotland: 8%
- Movie / film featuring Scotland: 6%
- Book about / set in Scotland: 6%
- Watching / reading about Scottish people in media/news: 6%
- Inspired by online video content about Scotland: 4%
- Watching / attending other events hosted in Scotland: 3%
- Inspired by marketing / PR / advert about Scotland: 3%
- Coverage in news of Scottish referendum in 2014: 2%
- Watching / attending Commonwealth Games 2014: 2%
- Watching / attending Ryder Cup 2014: 1%
Travel features, movies, TV programmes and books were particularly influential for European and Long Haul visitors.

Q12 Did any of these prompt you to consider Scotland for this holiday / short break? Base: S1 All (11743)

What Prompted Visitors To Consider Scotland?
Outlander (TV and book) has clearly had a significant impact in inspiring visitors to visit, particularly those from USA.
TV word cloud without Outlander
Film word cloud without Braveheart

Highlander
Harry Potter
Skyfall

Monty Python
Angels' Share
Brave
Made of Honour
Local Hero
Trainspotting
Sunshine on Leith
Rob Roy
Da Vinci Code
What We Did On Our Holiday
One day
Nerozzi Nations
Angels share

17
<table>
<thead>
<tr>
<th>Motivators by Region</th>
<th>Aberdeen &amp; Shire</th>
<th>Argyll &amp; the Isles</th>
<th>Ayrshire &amp; Arran</th>
<th>Cairngorm National Park</th>
<th>Dumfries &amp; Galloway</th>
<th>Dundee &amp; Angus</th>
<th>Edinburgh City</th>
<th>Fife</th>
<th>Glasgow City</th>
<th>Gr. Glasgow &amp; Clyde Valley</th>
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<tr>
<td>x is a place I have always wanted to visit</td>
<td>27%</td>
<td>35%</td>
<td>32%</td>
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<td>14%</td>
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</tr>
<tr>
<td>I have spent a holiday / short break in x before and wanted to do so again</td>
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<td>38%</td>
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<td>49%</td>
<td>43%</td>
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<td>27%</td>
<td>29%</td>
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<tr>
<td>x’s reputation for friendly people</td>
<td>16%</td>
<td>20%</td>
<td>19%</td>
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<td>15%</td>
<td>15%</td>
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</tr>
<tr>
<td>To visit family/friends who live in x</td>
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<td>27%</td>
<td>28%</td>
<td>17%</td>
<td>24%</td>
<td>34%</td>
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<td>39%</td>
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<td>23%</td>
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<td>It is easy to get to</td>
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Q7 And what was it that attracted you to come to REGION on this occasion?
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<th>Motivators by Region (2)</th>
<th>Highlands</th>
<th>LLTNP</th>
<th>Lothians</th>
<th>Perthshire</th>
<th>Scottish Borders</th>
<th>SFFV</th>
<th>Orkney</th>
<th>Outer Hebrides</th>
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<tr>
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<td>209</td>
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<td>135</td>
</tr>
</tbody>
</table>

Q7 And what was it that attracted you to come to REGION on this occasion?
Online and offline sources are important in trip planning, with websites and personal advice used by the majority of visitors. Print still features with different formats appealing to different age groups.

- **Websites**: 69%
- **Talking with friends / family**: 58%
- **Printed travel guide books**: 17%
- **Printed brochures**: 13%
- **Calls / visits to visitor information offices**: 6%
- **Personal advice from travel professionals / agents**: 6%
- **Newspapers / magazines**: 4%
- **Other**: 6%
- **Apps**: 5%
- **TV / radio**: 3%
- **Calls to travel providers (e.g. hotels, airlines)**: 3%

### Information sources used to plan visit

- **Average of 1.9 sources used.** Higher for Long Haul (2.4), European (2.3) and First Time (2.3) visitors
- **WOM recommendations** particularly important for younger age groups 16-44yrs (65%) and Long Haul visitors (66%) where knowledge of Scotland is likely to be lower
- A fifth (22%) of Long Haul visitors and 1 in 10 65+yrs took personal advice from a travel agent
- European (43%), Long Haul visitors (33%) and 16-34yrs (21%) most likely to use printed guide books
- 65+yrs prefer printed brochures (20%)
- Males and Long Haul visitors more likely to use apps (7%)

Q9 Which of the following sources of information were helpful when planning your holiday / short break in Scotland? Base: S2 All (2999)
Google search was used by almost 9 in 10, whilst visitscotland.com and travel review sites were also important online planning sources.

- Google search engine: 86%
- VisitScotland.com: 46%
- Traveller review websites: 45%
- Transport provider website: 20%
- Individual tourism provider’s website: 18%
- Travel agency websites: 10%
- Social media: 9%
- Travel guide websites: 8%
- Travel search engine website: 5%
- Other search engine: 5%
- Magazine/newspaper websites: 4%
- Other website: 4%

- Half of all 25-44yrs used visitscotland.com as did 65% Europeans and 57% of Long Haul visitors
- Traveller review sites particularly popular with Long Haul visitors (64%) who are also most likely to use these to post reviews of their experience in Scotland
- Transport provider sites most commonly used by European visitors (39%)
- Social media important for 16-24yrs (20%), in conjunction with other resources
- 55-64 and 65+ age groups most likely to go direct to tourism provider website (24%, 28%)

Q10 What types of websites did you use when planning your holiday / short break in Scotland? Base: S2 All who used websites to plan holiday (2210)
User generated content, particularly reviews & ratings, was important for visitors when planning their trip to Scotland

- Traveller submitted reviews / ratings: 63%
- Interactive maps displaying accommodation & attractions: 34%
- Traveller submitted photos: 28%
- Professional photos: 23%
- Professional reviews / ratings: 22%
- Comments / posts from people on social media: 15%
- Company info / promotions on social media: 13%
- Professional videos: 4%
- Traveller submitted video content: 4%
- Did not use this type of content: 17%

- Long Haul visitors were most likely to mention each of these types of content, consistent with their higher usage of multiple online sources in planning
- Photos (by travellers and professionals) and videos were particularly sought by 16-24s
- 28% of 65+ did not use this type of content at all

Q11 And what types of online information did you use when planning your holiday / short break in Scotland? Base: S2 All who used websites to plan holiday (2210)
Location & value are fundamental aspects in choice of accommodation, but availability of free WiFi is next most important factor, particularly for younger visitors.

Q20 Which of the following aspects, if any, were important in helping you choose your accommodation? Base: S2 All who didn’t only stay in second home or with friends / family (2731)

- Free WiFi most important for international and younger visitors
- Value for money more important for younger age groups (under 45yrs)
- Previous experience particularly important for over 65 year olds (30%) and Scot residents (27%)
- Scot residents looking for specific facilities (16%), restaurant quality (13%), pet friendly (8%) and childcare (5%)

Note: quality star grading was not a specified QA scheme.
During Trip

Caerlaverock castle, dumfries & galloway

Note: all satisfaction ratings use scale 1=extremely dissatisfied -> 10=extremely satisfied
80% of people spent their whole visit in Scotland

20% of people visited Scotland as part of a longer trip

61% long haul visitors, visited Scotland as part of a longer holiday

30% of visitors to Edinburgh were visiting as part of a longer holiday

Q4 Is your holiday/short break in Scotland part of a longer holiday which includes time in other places, or will you spend your whole time in Scotland? Base: S1 All (11743)
<table>
<thead>
<tr>
<th>Region</th>
<th>Whole time in Scotland</th>
<th>Part of a longer holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aberdeen &amp; Shire</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Argyll &amp; the Isles</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Ayrshire &amp; Arran</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Cairngorm National Park</td>
<td>81%</td>
<td>19%</td>
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<tr>
<td>Dumfries &amp; Galloway</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Dundee &amp; Angus</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Edinburgh City</td>
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<tr>
<td>Glasgow City</td>
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<tr>
<td>Gr.Glasgow &amp; Clyde Valley</td>
<td>75%</td>
<td>25%</td>
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</tbody>
</table>

**BASE**

79% 84% 91% 81% 78% 80% 70% 77% 72% 75%

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<table>
<thead>
<tr>
<th>Region</th>
<th>Highlands</th>
<th>LLTNP</th>
<th>Lothians</th>
<th>Perthshire</th>
<th>Scottish Borders</th>
<th>SFFV</th>
<th>Orkney</th>
<th>Outer Hebrides</th>
<th>Shetland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole time in Scotland</td>
<td>78%</td>
<td>80%</td>
<td>79%</td>
<td>76%</td>
<td>73%</td>
<td>86%</td>
<td>79%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Part of a longer holiday</td>
<td>22%</td>
<td>20%</td>
<td>21%</td>
<td>24%</td>
<td>27%</td>
<td>14%</td>
<td>21%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**BASE**

1375 284 111 381 160 280 347 219 155

---

Q4 Is your holiday/short break in Scotland part of a longer holiday which includes time in other places, or will you spend your whole time in Scotland?
# Mode Of Travel To Scotland

## First Time Visitors
- 58% arrived by plane
  - direct (39%)
  - indirect (19%)
  - 63% arrived to Edinburgh airport
- 28% arrived in Scotland by car
  - own car (17%)
  - hire car (9%)
  - friend / family car (2%)
- 11% travelled by train (within UK)

## European Visitors
- 72% arrived by plane
  - direct (56%)
  - indirect (16%)
  - 71% arrived to Edinburgh airport
- A quarter travelled by car (24%)
  - own / friend / family car (15%)
  - hire car (9%)
- 9% used boats, ships or ferries

## Rest of UK Visitors
- 64% travelled by car
  - own car (55%)
  - friend / family car (5%)
  - hire car (4%)
- 16% travelled by train (within UK)
- 16% arrived by plane (direct)
  - Edinburgh airport (42%)
  - Glasgow airport (29%)
  - Aberdeen airport (16%)

## Repeat Visitors
- 57% travelled by car
  - own car (48%)
  - hire car (5%)
  - friend / family car (4%)
- 29% arrived by plane
  - direct (23%)
  - indirect (6%)
- 15% travelled by train (within UK)

## Long Haul Visitors
- 76% arrived by plane
  - indirect (41%)
  - direct (35%)
  - 47% arrived in Edinburgh; 32% Glasgow airport
  - 36% connected via Heathrow
- 17% arrived by car
  - hire car (13%)
  - own / friend / family car (4%)
- 16% travelled by train (within UK)

## Transport methods differ significantly by market
Ease of getting around Scotland was rated highly by visitors and attracted the highest mean score for satisfaction across all the areas of the visitor experience measured.

Q26 What types of transport did you use while you were in Scotland?  
Q28 Overall, how satisfied were you with the ease of getting around?  
Base: S2 All (2999)  
Q27 Did you use the new Borders railway during your visit to Scotland? All who visited Edinburgh, Lothians or Scottish Borders from 5th Sept onwards (1182)

Transport Used In Scotland

- Own Car: 49%
- Walked: 33%
- Public Bus/Coach: 28%
- Train: 24%
- Boat/Ship/Ferry: 21%
- Hire Car: 16%
- Friend/Family Car: 13%
- Coach Tour: 8%
- Plane: 5%
- Bicycle: 3%
- Motorhome/Campervan: 3%
- Motorbike: 1%
- Friend/Family Car: 13%
Number of areas visited differs greatly by market – the further visitors have travelled, the more areas they visit. Edinburgh City was the most visited location, by two-fifths of visitors.

Average of 2.4 different areas visited
- Scot residents = 1.5
- Rest of UK = 2.1
- Europeans = 3.7
- Long Haul = 4.1

Q1 Which areas of Scotland did you visit on this trip?  Base: S2 All (2999)

Areas Of Scotland Visited On This Trip

- Edinburgh City = 43%
- Glasgow City = 26%
- Highlands = 23%
- Greater Glasgow & Clyde Valley = 22%
- Stirling, Falkirk & Forth Valley = 21%
- LL&T National Park = 20%
- Perthshire = 17%
- Aberdeen & Aberdeenshire = 16%
- Argyll & the Isles = 15%
- Ayrshire & Arran = 13%
- Fife = 13%
- Dumfries & Galloway = 11%
- Cairngorms National Park = 10%
- Lothians = 9%
- Scottish Borders = 9%
- Dundee & Angus = 9%
- Orkney = 5%
- Outer Hebrides = 3%
- Shetland = 2%
### Visiting The National Parks

#### Cairngorms National Park

- **10%** visited Cairngorms National Park
- **51%** of those visited Dalwhinnie, Kingussie, Newtonmore, Aviemore, Carrbridge, Granton-on-Spey
- **43%** visited Balmoral, Braemar, Ballater, Aberdeenshire Area
- **38%** visited Blair Atholl, Killiecrankie, Perthshire Area

#### Loch Lomond & Trossachs National Park

- **20%** visited Loch Lomond & Trossachs National Park
- **72%** visited Balloch, Luss, Gartocharn, Balmaha, South Loch Lomond Area
- **38%** visited Aberfoyle, Callander, Doune, Strathyre, Killin, Port of Menteith Area
- **24%** visited Helensburgh, Tyndrum, Crianlarich

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Q2b Which part(s) of Cairngorms National Park did you visit?
Q2c Which part(s) of Loch Lomond and the Trossachs National Park did you visit?

Base: S2 All who visited NPs (CNP 503 / LLTNP 780)
Top three regions where visitors stayed overnight are consistent with the top three areas visited. Some other areas show differences in visitation vs overnight stays.

<table>
<thead>
<tr>
<th>Region</th>
<th>Visitation %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh City</td>
<td>31%</td>
</tr>
<tr>
<td>Glasgow City</td>
<td>18%</td>
</tr>
<tr>
<td>Highlands</td>
<td>16%</td>
</tr>
<tr>
<td>Aberdeen &amp; Aberdeenshire</td>
<td>13%</td>
</tr>
<tr>
<td>Ayrshire &amp; Arran</td>
<td>11%</td>
</tr>
<tr>
<td>Argyll &amp; the Isles</td>
<td>11%</td>
</tr>
<tr>
<td>Perthshire</td>
<td>10%</td>
</tr>
<tr>
<td>Stirling, Falkirk &amp; Forth Valley</td>
<td>9%</td>
</tr>
<tr>
<td>Greater Glasgow &amp; Clyde Valley</td>
<td>9%</td>
</tr>
<tr>
<td>Dumfries &amp; Galloway</td>
<td>8%</td>
</tr>
<tr>
<td>LL&amp;T National Park</td>
<td>7%</td>
</tr>
<tr>
<td>Fife</td>
<td>7%</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>5%</td>
</tr>
<tr>
<td>Dundee &amp; Angus</td>
<td>5%</td>
</tr>
<tr>
<td>Cairngorms National Park</td>
<td>4%</td>
</tr>
<tr>
<td>Orkney</td>
<td>4%</td>
</tr>
<tr>
<td>Lothians</td>
<td>4%</td>
</tr>
<tr>
<td>Outer Hebrides</td>
<td>3%</td>
</tr>
<tr>
<td>Shetland</td>
<td>2%</td>
</tr>
</tbody>
</table>

Visitors stayed in 1.7 different areas on average
- Scot residents = 1.2
- Rest of UK = 1.5
- Europeans = 2.5
- Long Haul = 2.4

Q3 And which of these areas did you stay overnight in? Base: S2 All (2999)
The most popular types of accommodation were hotels, self-catering and B&B/guest houses but key differences emerge by market and type of visitor:

- **Long Haul** and **European visitors** more likely to stay in hotels (57%, 48%), B&B/Guest houses (35%, 34%) and hostels (8%, 10%)
- **Long Haul** also most likely to stay with friends/family (26%)
- Airbnb favoured by **Long Haul** (13%) and **under 35s** (10%)
- **Rest of UK** and **Scot residents** most likely to self-cater (25%, 23%)
- **Scot residents** also most likely to camp (9%), motorhome (7%) or static caravan (6%)

**Type of Accommodation**

- **Hotel**: 41%
- **Self Catering**: 22%
- **B&B/Guest House**: 20%
- **Family/Friends**: 19%
- **Camping**: 6%
- **Hostel**: 5%
- **Touring Caravan/Campervan**: 5%
- **Airbnb**: 5%
- **Static Caravan**: 3%
- **Second Home**: 2%
- **Glamping**: 1%

Q17 What type of accommodation did you stay in during your trip? Base: S2 All (2999)
Standard of accommodation was praised by most visitors, exceeding expectations for two-fifths

42% said the standard of accommodation exceeded their expectations

53% said the standard of accommodation met their expectations

5% said the standard of accommodation was below their expectations

Q23 Did the quality of the accommodation you stayed in meet your expectations? Base: S2 All who didn’t only stay in second home or with friends / family (2731)

- Glamping (63%)
- Airbnb (53%)
- Camping (51%)
- 16-34s (56%)

Reasons expectations not met

- Below expected standard given price 17%
- Not clean 17%
- Facilities needed upgrading 14%
- Poor customer service / unfriendly 10%
- Food was poor 10%
- Not as advertised 8%
- Something else 7%

Highest for
- those staying in hotels (8%)
- 55-64s (8%)
Half of visitors gave a 9 or 10/10 rating for the service provided by accommodation staff; staff knowledge about the local area was also praised.
Ratings for the value for money of accommodation are reasonably high, however mean scores for free WiFi are lower.

### Value for money - accommodation

<table>
<thead>
<tr>
<th>Top 2 box</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>8.0</td>
</tr>
</tbody>
</table>

### Availability of free WiFi - accommodation

<table>
<thead>
<tr>
<th>Top 2 box</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>7.5</td>
</tr>
</tbody>
</table>

Q25 Thinking about the accommodation you stayed in in Scotland as a whole overall how satisfied were you with:

*Base: S2 All who didn’t only stay in second home or with friends / family (2731)*

- Scot residents give highest top 2 box scores for value for money (49%)
- Long haul visitors give highest top 2 box scores for availability of free WiFi (54%)
A fifth posted reviews about their accommodation - most likely to be those at either end of the satisfaction spectrum

- Long Haul visitors (19%) and over 35s were most likely to leave reviews on TripAdvisor
- Long Haul and European visitors left reviews on other sites (16%, 17%)
- Domestic visitors and 16-24s were least likely to leave any reviews.

Posting Reviews

Q24 Did you leave any reviews about the accommodation you stayed in in Scotland on TripAdvisor or another review site?
Base: S2 All who didn’t only stay in second home or with friends / family (2731);
In person advice the preferred approach for visitors to gain information on what to see and do, with local people playing a crucial role. Younger visitors are more likely to use online sources, but not exclusively.

- **Talking with locals**: 46%
- **Google**: 34%
- **VIC**: 33%
- **Personal advice from accommodation provider**: 33%
- **Other leaflets from accommodation**: 31%
- **VisitScotland.com**: 28%
- **Accommodation room pack info**: 27%
- **Information / advice from visitor attraction**: 20%
- **Printed travel guide books**: 18%
- **Other websites**: 18%
- **Travel guide websites**: 11%
- **Online review websites**: 10%
- **Social media**: 8%
- **Apps**: 3%
- **Other search engine**: 2%
- **None of these**: 9%

- Google (47%), travel guide websites (17%) and social media (14%) most popular with **under 35s**
- **Long Haul** and **European** visitors mention multiple sources of information
Visitors engaged in a range of activities in Scotland with international visitors being most active

**Top Activities**

- **Sightseeing:** 74%
- **Historic House/ Stately Home/ Castle:** 60%
- **Short Walk/ Stroll:** 54%
- **Shopping:** 46%
- **Church/ Abbey Cathedral:** 46%
- **Museum/ Art Gallery:** 45%
- **Centre-based Walking:** 45%
- **Country Park/ Garden:** 43%
- **Cities:** 42%
- **Woodland/ Forest:** 31%
- **Architecture/ Buildings:** 29%
- **Beach:** 38%
- **Long Walk/ Hike/Ramble:** 38%
- **Visitor/ Heritage Centre:** 35%
- **Architecture/ Buildings:** 29%
- **Wildlife/ Bird Watching:** 21%

**Q30** Which, if any, of the following activities did you take part in during your trip to Scotland? Base: S2 All (1608)

### Activities Undertaken (1)

- **International** (esp. Long Haul) and **1st time** visitors are much more active, especially for sightseeing activities.
- **Whilst domestic and repeat** visitors are more focused on outdoors and sports.
Activities were rated highly by visitors, with many saying they exceeded expectations and were good value. Some potential exists to increase options in all weathers.

There was enough to do in all weather conditions

There was enough to do in the evenings

61% of visitors said the quality of activities exceeded their expectations; and 39% said expectations were met.

Value for money - activities

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements? Base: S2 All (2999)
Q32 Overall did the quality of activities you experienced in Scotland meet your expectations? Base: S2 All who undertook an activity (2984)
Q33 Thinking about the activities you undertook whilst in Scotland, overall how satisfied were you with... Base: S2 All who undertook an activity (2984)
Food and drink is a key component of the visitor experience; international visitors are keen to try local foods and domestic visitors cite food as a key factor in accommodation choice.

When on holiday I really like to find out about the local foods & local dishes unique to the destination

<table>
<thead>
<tr>
<th>Disagree strongly</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>Agree strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>9%</td>
<td>14%</td>
<td>21%</td>
<td>17%</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top 2 box: 43%
Mean: 7.9

8% said the reputation of the restaurant / quality of food was a factor in choosing their accommodation

70% of those who gave a 9 or 10 score here went on to try local food and 55% to try local drinks during their visit to Scotland...is there an opportunity to encourage more?

Q45c To what extent do you agree or disagree with the following statements about holidays in general? Base: S2 All (2999)
A gap exists between expectations and experience of the quality of food in Scotland, particularly for international visitors.

### Quality Of Food - Expectations vs Experience

<table>
<thead>
<tr>
<th></th>
<th>Scots Residents</th>
<th>Rest of UK Residents</th>
<th>Europeans</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectation</td>
<td>7.8</td>
<td>7.4</td>
<td>6.0</td>
<td>6.6</td>
</tr>
<tr>
<td>Experience</td>
<td>8.3</td>
<td>7.9</td>
<td>7.3</td>
<td>8.1</td>
</tr>
<tr>
<td>Difference</td>
<td>0.5</td>
<td>0.5</td>
<td>1.3</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Mean Score
- Expectation: 7.2
- Experience: 7.9

Q34 Now thinking about the quality of food in Scotland, please complete the following statements:
a) Before my trip I expected the food in Scotland to be...;  
b) During my trip the food I experienced was generally... Base: S2 All (2999)
Almost all visitors dined out whilst in Scotland. International visitors were much more likely to have had all of these food and drink experiences other than picnics/BBQs.

Dined out in Restaurant/ Café/ Pub: 92%
Tried Local Food: 55%
Tried Local Drinks: 46%
Night out/Visited Pubs: 35%
Had a Picnic/ BBQ: 29%

Visited a Whisky Distillery: 20%
Attended a Food/Drink Event: 4%
Went on a Food or Drink Trail: 1%

• The vast majority of Long Haul and European visitors tried local food (81%, 72%); and local drinks (72%, 68%)
• Over half (55%) of Long Haul visitors had a night out / visited pubs
• European visitors (38%) were most likely to visit a distillery, closely followed by Long Haul visitors (35%)
• Scot residents (33%) were most likely to have a picnic or BBQ

Q35 Which of the following did you experience during your holiday / short break in Scotland? Base: S2 All (2999)
Visitors rate availability of local produce and value for money of eating out lower than other aspects of their holiday experience

**Food & Drink Ratings**

Q38 Overall how satisfied were you with the following aspects of eating out during your holiday / short break in Scotland. 
Base: S2 All who dined out (2807)
Visitors are conflicted on the desire to remain in constant touch whilst on holiday. But digital connectivity remains important regardless.

“I want to be in constant touch with family, friends & current affairs whilst I'm on holiday”

<table>
<thead>
<tr>
<th>Disagree strongly</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>Agree strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7%</td>
<td>7%</td>
<td>11%</td>
<td>9%</td>
<td>18%</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Top 2 box: 15%  
Mean: 5.6

Long Haul travellers are most likely to want to stay in touch - 21% score Top 2 box

But digital connectivity is important. Few are not using some form of communication:

- Wi-Fi: 8%
- 4G: 22%
- Broadband: 10%

% not using each type of communication in Scotland

Q45a To what extent do you agree or disagree with the following statements about holidays in general? Base: S2 All (2999)
Q41 How satisfied were you with the following whilst in Scotland...? All who said N/A Base: S2 All (2999)
9 in 10 visitors seek information whilst in Scotland, on a range of topics. Using smartphones is the most common approach, followed by seeking in person advice.

### Used to find out information

- **Smartphone**: 68%
- **Talking face-to-face**: 52%
- **Tablet**: 36%
- **Laptop/desktop**: 19%
- **Telephone**: 12%
- **None of these**: 10%

### Type of information sought

- **Weather reports**: 82%
- **Maps / directions**: 75%
- **Things to see & do in local area**: 62%
- **Places to eat / drink in local area**: 55%
- **What’s on in local area**: 47%
- **Accommodation**: 27%
- **Transport**: 12%
- **Something else**: 2%

Q39 During your holiday or short break in Scotland, did you use any of the following to find out information relating to your trip while you were in Scotland?  Base: S2 All (2999)

Q40 What type(s) of information did you look for during your trip?  Base: S2 All who looked for information (2781)
Satisfaction with digital connectivity is lower than all other aspects of trip

**Connectivity Ratings**

**mobile phone signal**
- Top 2 box: 28%
- Mean: 6.9

**availability of free WiFi**
- Top 2 box: 25%
- Mean: 6.7

**availability of 3G/4G**
- Top 2 box: 18%
- Mean: 6.3

Q41 How satisfied were you with the following whilst in Scotland...? Base: S2 All (2999)
Opportunities to drive advocacy

<table>
<thead>
<tr>
<th>Satisfaction with....</th>
<th>Top 2 box</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of getting around</td>
<td>62%</td>
<td>8.7</td>
</tr>
<tr>
<td>Being made to feel welcome in VIC</td>
<td>56%</td>
<td>8.5</td>
</tr>
<tr>
<td>Availability of useful information in VIC</td>
<td>52%</td>
<td>8.5</td>
</tr>
<tr>
<td>Value for money of attractions</td>
<td>51%</td>
<td>8.4</td>
</tr>
<tr>
<td>VIC customer service</td>
<td>49%</td>
<td>8.4</td>
</tr>
<tr>
<td>Service provided by staff at accommodation</td>
<td>49%</td>
<td>8.3</td>
</tr>
<tr>
<td>Knowledge of staff at accommodation about things to do in local area</td>
<td>42%</td>
<td>8.3</td>
</tr>
<tr>
<td>Value for money of accommodation</td>
<td>42%</td>
<td>8.0</td>
</tr>
<tr>
<td>Availability of free WiFi at accommodation</td>
<td>40%</td>
<td>7.5</td>
</tr>
<tr>
<td>Availability of local produce when eating out</td>
<td>33%</td>
<td>7.5</td>
</tr>
<tr>
<td>Value for money of eating out</td>
<td>27%</td>
<td>7.5</td>
</tr>
<tr>
<td>Mobile phone signal coverage</td>
<td>28%</td>
<td>6.9</td>
</tr>
<tr>
<td>Availability of free WiFi</td>
<td>25%</td>
<td>6.7</td>
</tr>
<tr>
<td>Availability of 3G / 4G</td>
<td>18%</td>
<td>6.3</td>
</tr>
</tbody>
</table>

In general, satisfaction scores over 8 are excellent, between 7-8 adequate and <7 requires attention.

Top 2 scores (9 and 10 out of a 1-10 scale) are required to create genuine satisfaction and loyalty, otherwise customers can be ‘indifferent’.

These results show a positive visitor experience but we should strive to push the proportion ticking Top 2 boxes higher.
Post Trip

Note: all satisfaction ratings use scale 1=extremely dissatisfied -> 10=extremely satisfied
Satisfaction with the overall visitor experience is high

9 or 10 scores (Top 2 Box) show genuine satisfaction and can foster loyalty. The challenge is to enhance the visitor experience for very visitor to encourage more to give the very highest scores on the satisfaction scale.

Note: post holiday reflection usually brings halo effect resulting in positive overall scores. New 1-10 scale helps understand more detail.

Overall Rating Of Holiday Experience

Q49 Overall, how would you rate your holiday / short break experience in Scotland? Base: S2 All (2999)
The positive experience enjoyed by visitors results in a very strong intention to recommend Scotland as a destination.

Q46: Based on your experiences during this trip, how likely are you to recommend Scotland as a holiday or short break destination to friends and family? Base: S2 All (1608)

- Top 2 box: 75%
- Mean: 9.2

84% Long Haul visitors gave Top 2 box scores

Going back to the early life cycle of holiday planning, remember recommendation from friends and family plays an important role in persuading visitors to spend a holiday in Scotland and as a source of information for planning their trip.
High levels of satisfaction and recommendation were recorded amongst all visitor types, particularly those who travelled from furthest afield.

### Satisfaction

<table>
<thead>
<tr>
<th>Region</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>9</td>
</tr>
<tr>
<td>Rest of world</td>
<td>9.3</td>
</tr>
<tr>
<td>Europe</td>
<td>8.9</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>9</td>
</tr>
<tr>
<td>Scotland</td>
<td>9</td>
</tr>
</tbody>
</table>

### Recommend

<table>
<thead>
<tr>
<th>Region</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>9.2</td>
</tr>
<tr>
<td>Rest of world</td>
<td>9.4</td>
</tr>
<tr>
<td>Europe</td>
<td>9.1</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>9.2</td>
</tr>
<tr>
<td>Scotland</td>
<td>9.2</td>
</tr>
</tbody>
</table>
9 in 10 visitors thought Scotland was worth visiting again. Half of Long Haul visitors felt it was one of the best breaks they had ever taken.

- **Scotland is a country worth visiting more than once**: 6% Disagree strongly, 13% Agree strongly, 18% Agree somewhat, 60% Agree strongly.
  - Top 2 box: 78%
  - Mean: 9.2

- **There is more to Scotland than I had previously thought**: 7% Disagree strongly, 11% Agree strongly, 10% Agree somewhat, 14% Agree strongly, 18% Agree somewhat, 12% Agree strongly, 23% Agree strongly.
  - Top 2 box: 35%
  - Mean: 7.6

- **This was one of the best holidays / short breaks I have ever taken**: 10% Disagree strongly, 12% Agree strongly, 21% Agree somewhat, 20% Agree strongly, 11% Agree somewhat, 19% Agree strongly.
  - Top 2 box: 30%
  - Mean: 7.5

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements? Base: S2 All (2999)
Visitors were clearly made to feel very welcome during their time in Scotland, and interactions with locals had a positive impact on the visitor experience.

Scotland’s reputation for friendly people was a motivation to visit for 15% of visitors.

Q52 Thinking of your experience in Scotland overall, to what extent do you agree or disagree with the following statements?
Base: S2 All (2999c)
| Top 10 Words Used To Describe People Met In Scotland |
|---------------------------------|--------|
| Friendly                        | 51%    |
| Helpful                         | 21%    |
| Welcoming                       | 11%    |
| Nice                            | 5%     |
| Warm                            | 4%     |
| Kind                            | 3%     |
| Open                            | 3%     |
| Interesting                     | 3%     |
| Happy                           | 2%     |
| Funny                           | 2%     |

| 11-20 Words Used To Describe People Met In Scotland |
|---------------------------------|--------|
| Polite                          | 2%     |
| Fun                             | 2%     |
| Pleasant                        | 2%     |
| Proud                           | 2%     |
| Knowledgeable                   | 2%     |
| Hospitable                      | 2%     |
| Cheerful                        | 1%     |
| Lovely                          | 1%     |
| Interested                      | 1%     |
| Chatty                          | 1%     |
Half (53%) gave a suggestion of something that would have improved their trip.

The top suggestion was a positive one = to have had more time / a longer holiday in Scotland (30%)

Key areas where improvements could be made include digital connectivity, roads & value for money

<table>
<thead>
<tr>
<th>Potential Improvements</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better / more free WiFi</td>
<td>19%</td>
</tr>
<tr>
<td>Better / bigger roads / better road signage</td>
<td>17%</td>
</tr>
<tr>
<td>Lower costs / better value for money</td>
<td>17%</td>
</tr>
<tr>
<td>Better 3G / 4G / mobile phone coverage</td>
<td>14%</td>
</tr>
<tr>
<td>Better food (variety / quality / local)</td>
<td>10%</td>
</tr>
<tr>
<td>Better public transport</td>
<td>8%</td>
</tr>
<tr>
<td>Better accommodation</td>
<td>6%</td>
</tr>
<tr>
<td>Longer opening hours</td>
<td>4%</td>
</tr>
<tr>
<td>Fewer midgies</td>
<td>4%</td>
</tr>
<tr>
<td>More information / maps</td>
<td>4%</td>
</tr>
<tr>
<td>Better customer service</td>
<td>4%</td>
</tr>
<tr>
<td>More to do / more activities</td>
<td>3%</td>
</tr>
<tr>
<td>Better currency exchange rates</td>
<td>3%</td>
</tr>
<tr>
<td>Better parking</td>
<td>2%</td>
</tr>
<tr>
<td>Less litter</td>
<td>2%</td>
</tr>
<tr>
<td>Something else</td>
<td>40%</td>
</tr>
</tbody>
</table>

Q54 Apart from the weather, what one improvement would have enhanced your holiday/short break in Scotland? Base: 847
Further information

The Scotland Visitor Survey 2015 & 2016 was conducted for VisitScotland by Jump Research.

Further data and fact sheets are available via:
www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx

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Thank you

Loch Achray towards Ben Venue, Stirling