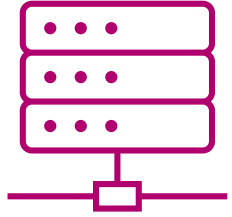


SCOTLAND VISITOR EXPERIENCE 2022

ONLINE RESEARCH WITH VISITSCOTLAND UK AND IRELAND CUSTOMERS

(30 SLIDES)

KEY SECTIONS



Topic	Slide Number
Research Objectives and Methodology	Slides 3 and 4
Survey Respondents	Slide 5
Key Findings	Slide 6
2022 Visitor Trip Experience <ul style="list-style-type: none">• Motivations• Visitors by origin• Areas visited• Travel• Accommodation• Activities• Satisfaction	Slides 7 to 24 Slide 8 and 9 Slide 10 Slides 11 to 14 Slides 15 to 17 Slides 18 to 20 Slides 21 to 22 Slide 24
2023 Holiday Intentions and the Impact of the Cost of Living Crisis	Slides 26 to 29

RESEARCH OBJECTIVES

The key objectives of this research study with VisitScotland's UK and Ireland customers were:

1. Visitor profiles

To understand the profile of people amongst VisitScotland's engaged audience who took a holiday or short break in Scotland from January to December 2022.

2. Visitor behaviour and trip characteristics

To provide insights into the motivations to visit Scotland, the planning process, trip characteristics and satisfaction with aspects of their trip.

3. Future intentions

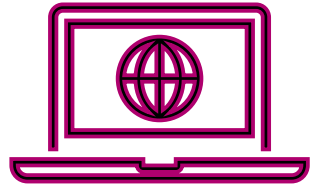
To explore short term (next 12 months) intentions for holidays/short breaks in Scotland and confidence that trips will take place.

4. Cost of Living (COL) Crisis

To understand the impact of the COL crisis amongst our engaged audience.

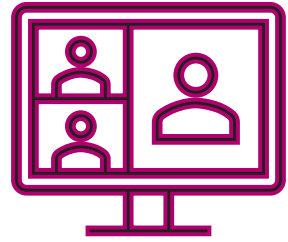


RESEARCH METHODOLOGY



- **The survey explored the holiday behaviours and views of an engaged audience drawn from VisitScotland's (VS) UK consumer database.** This audience receives marketing communications from VS, and many are loyal and repeat visitors to Scotland. The findings do not therefore represent a nationally representative sample.
- The data was collected by online survey by an independent research firm, [Progressive Partnership](#).
- **Fieldwork was undertaken between 16th January and 13th February 2023.**
- **The final achieved sample size was 3,187.**
- Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling, and, in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey. The overall response rate to the survey was 4%. It should be noted that the high level of non-response may have an impact on findings should non-responding individuals be different from respondents in any significant or systematic way. An incentive of ten £50 shopping or Amazon vouchers encouraged a positive response to the survey.
- The overall sample size of 3,187 provides a dataset with a margin of error of between $\pm 0.4\%$ and $\pm 1.7\%$, calculated at the 95% confidence level (market research industry standard).

SUMMARY OF SURVEY RESPONDENTS



- 58% of visitors lived in England, with 37% from Scotland, 2% from Wales and 2% from Republic of Ireland/Northern Ireland.
- The visitor sample was skewed to older age groups. 92% were aged over 44 years old.
- 43% were aged over 65, 34% between 55 and 64, 15% between 45 and 54, 4% between 35 and 44 and 1% between 18 and 34.
- Almost three fifths of visitors were female (58%). 41% were male and 1% stated prefer not to say.
- Half of the visitor sample were retired (51%), with 29% in full time work, 15% working part time and 4% not currently working.
- 11% of respondents reported that they had children in their party. Of those that had children in their party, almost two thirds had 6 to 12 year olds (64%).

KEY FINDINGS

Motivations	In 2022, visitors from the UK and Ireland market were motivated to visit Scotland because they were looking for an escape, to get away from it all, to connect with nature and to revisit somewhere they have had a good experience. Motivations for taking a holiday varied by type of visitor.
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. With the exception of Edinburgh, rural areas tended to dominate.
Booking	When booking accommodation, booking directly with accommodation providers was the most popular method, particularly for repeat visitors, followed by an online travel website, particularly for first time visitors. The majority opted for non-serviced accommodation, with a third staying in self-catering and a fifth camping or caravanning. Two in five stayed in a hotel.
Travel to Scotland	Most visitors from England travelled to Scotland by car, train or campervan.
Activities	Activities tended to be outdoor related – walking and enjoying outdoors and wildlife. Visiting historical and cultural attractions remain popular as well.
Satisfaction	Satisfaction with the holiday experience was very high, particularly the welcome of local people and the availability of activities.
Holiday Plans for 2023	The cost-of-living crisis is expected to have an impact on holiday plans for 2023, particularly amongst those stating they don't plan to have a holiday. The main impact it is expected to have is staying in less expensive accommodation and doing activities that are free of charge. Taking fewer holidays was also mentioned by almost two fifths.

UK AND IRELAND VISITORS 2022

TRIP MOTIVATION CHARACTERISTICS SATISFACTION



Image: Northern Lights at Mounthooley Dovecot, copyright @ VisitScotland

MOTIVATION TO TAKE A HOLIDAY OR SHORT BREAK (1)

The main motivators for taking a holiday or short break were to revisit somewhere they had a good experience before, to connect with nature or be outdoors and to get away from it all and have a change of environment.



Male visitors were more likely than female visitors to visit:

- because of an interest in a particular area (e.g. sport, music) (21% vs. 17%);
- because they wanted to go somewhere where there was great food (21% vs. 16%);
- because they were looking for an active holiday, with exercise or sport (15% vs. 9%); and
- because they were looking for an adventure or a challenge (11% vs. 7%).

Female visitors were more likely than male visitors to visit:

- to connect with nature or be outdoors (49% vs. 44%)

MOTIVATION TO TAKE A HOLIDAY OR SHORT BREAK (2)

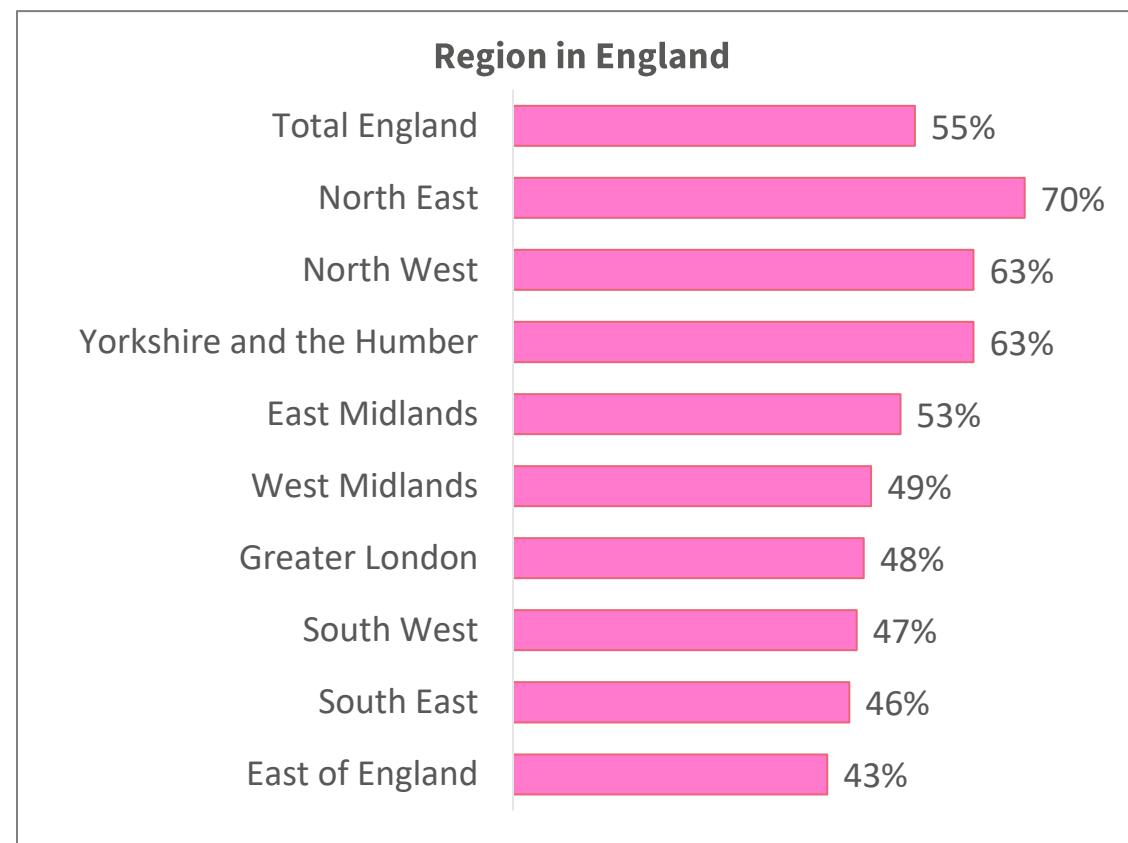
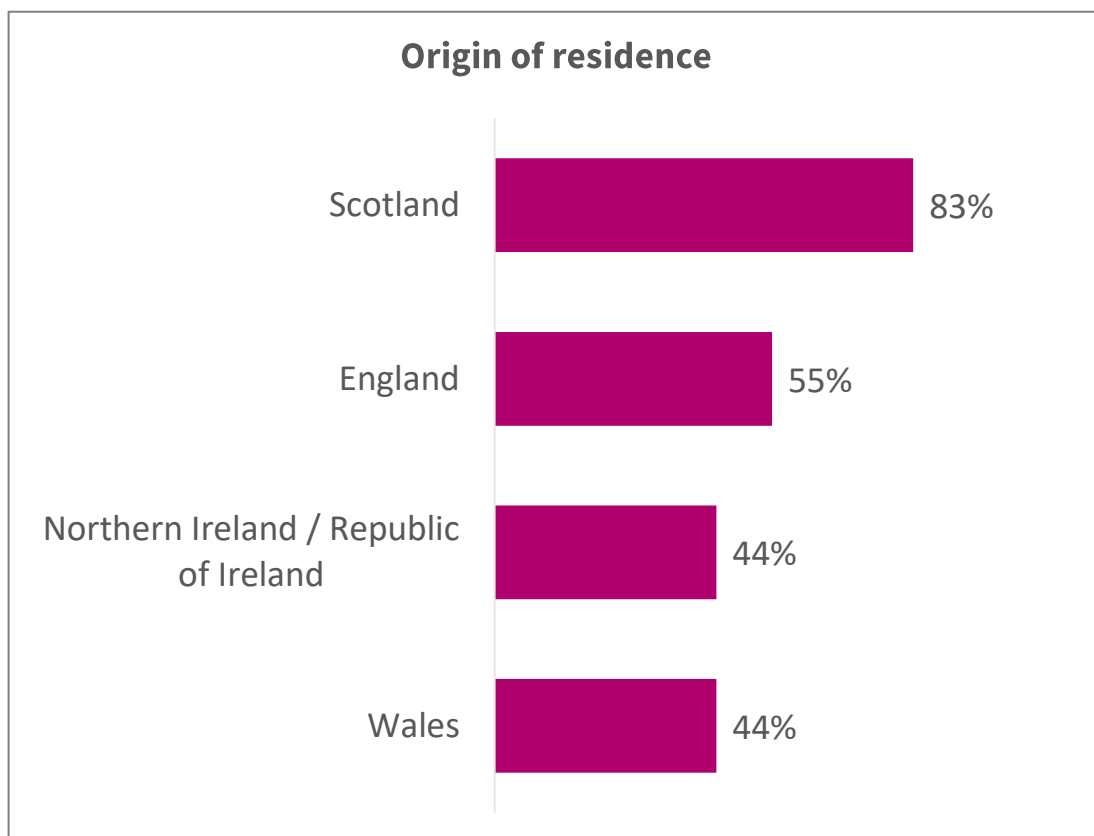
Non-Scotland residents were more likely than Scotland residents to want to revisit somewhere they had a good experience before or need to visit family or friends. Scotland residents were more likely than non-Scotland residents to need a change of environment, not want to travel far, to want to support tourism businesses suffering during the pandemic, or to want something to enhance their mental health.



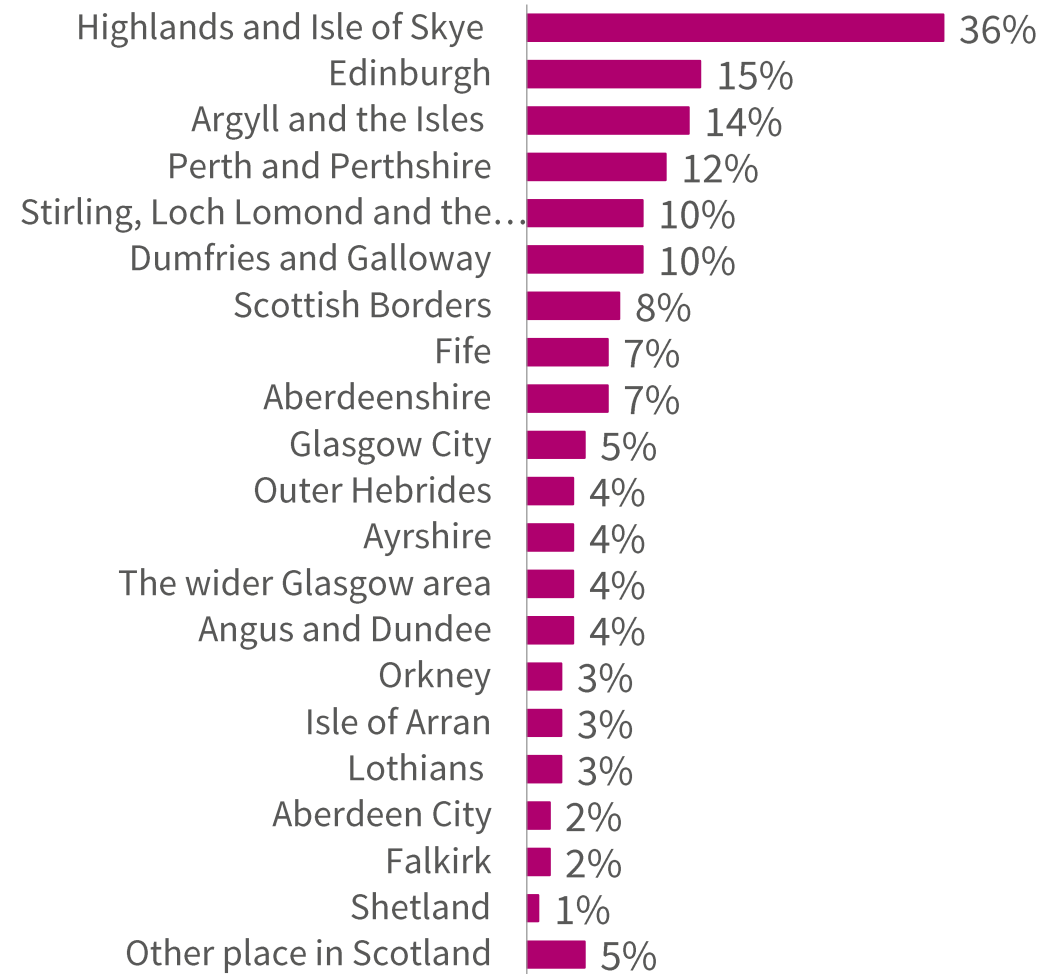
VISITORS BY ORIGIN

Respondents from Scotland were more likely to have had a holiday or short break in Scotland in 2022 than those from the rest of the UK or Republic of Ireland (ROI), and respondents from England were more likely than those from NI/ROI to have visited.

Amongst respondents from England, a higher proportion from the North East, the North West and Yorkshire and the Humber visited Scotland in 2022, compared to other English regions.



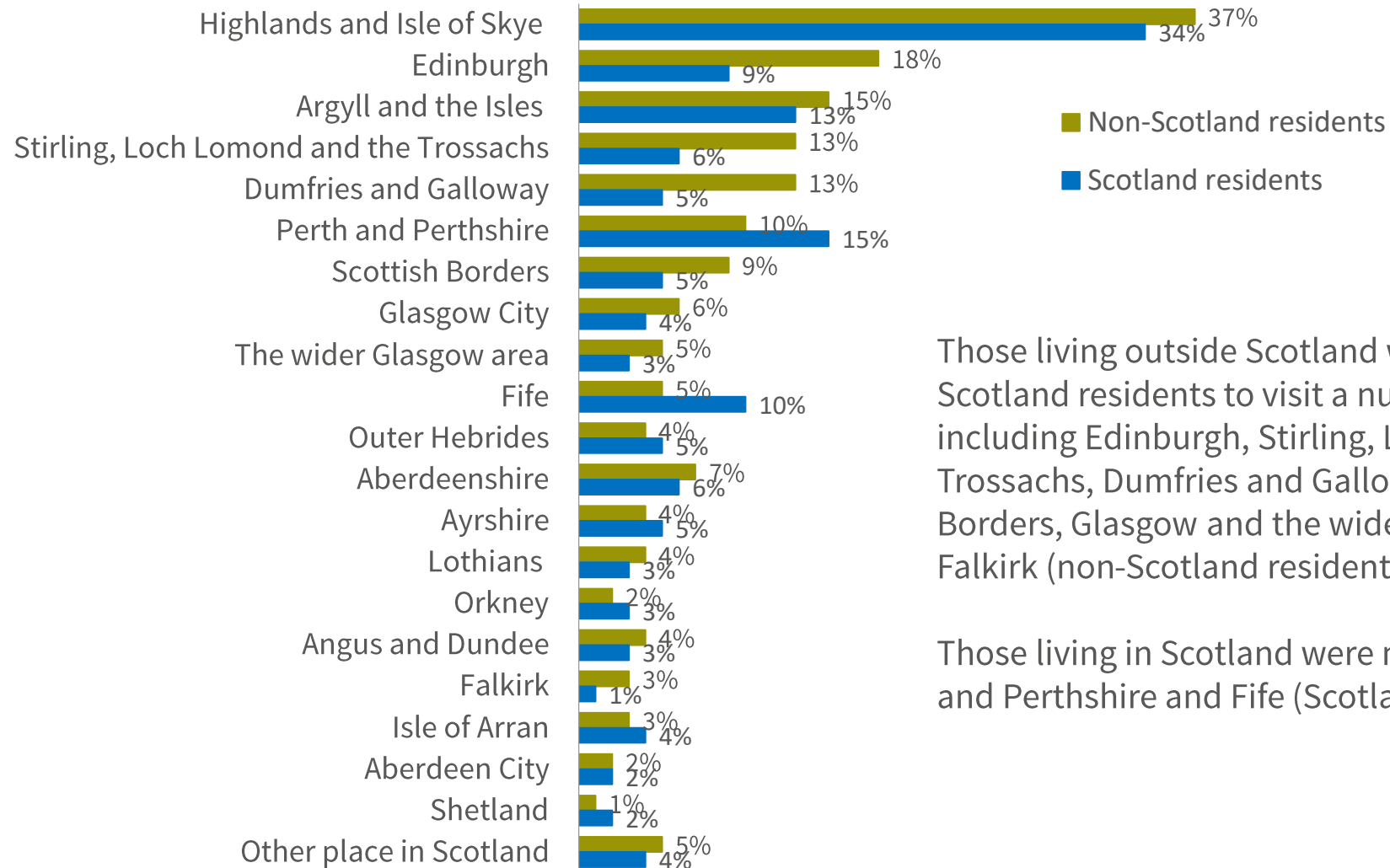
AREAS VISITED IN SCOTLAND



The Highlands and Isle of Skye was the most visited area.

With the exception of Edinburgh, rural locations tended to dominate.

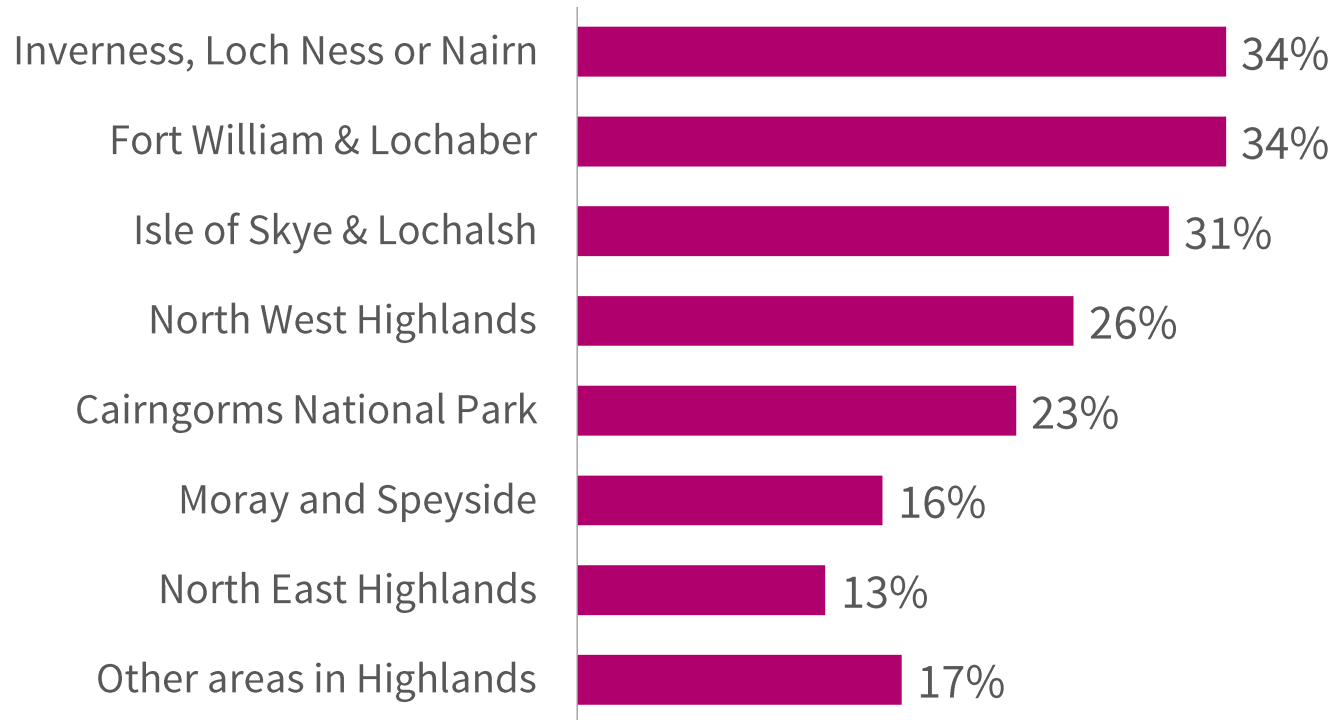
AREAS VISITED IN SCOTLAND (SCOTLAND AND NON-SCOTLAND RESIDENTS)



Those living outside Scotland were more likely than Scotland residents to visit a number of areas, including Edinburgh, Stirling, Loch Lomond & the Trossachs, Dumfries and Galloway, the Scottish Borders, Glasgow and the wider Glasgow area and Falkirk (non-Scotland residents)

Those living in Scotland were more likely to visit Perth and Perthshire and Fife (Scotland residents)

AREAS VISITED IN THE HIGHLANDS



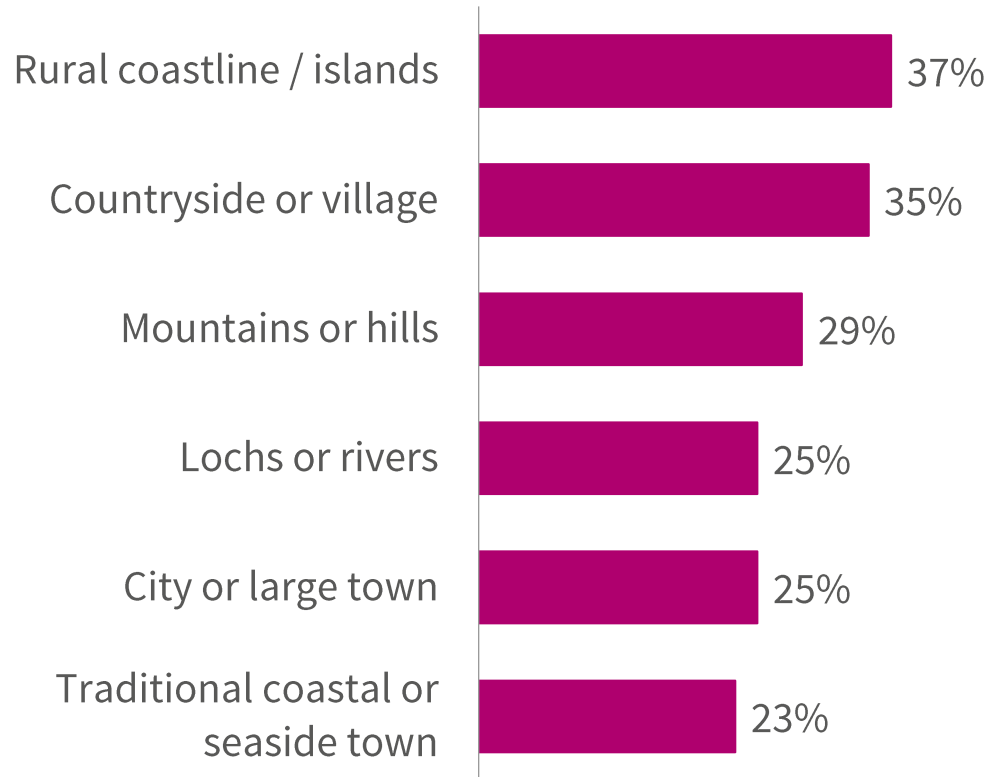
Amongst those who visited the Highlands, the three most visited areas were:

Inverness, Loch Ness & Nairn

Fort William & Lochaber

Isle of Skye & Lochalsh.

TYPES OF DESTINATION



Confirming the popularity of rural destinations, rural coastlines & islands and countryside & villages were the most common destination types for visitors.

Repeat visitors (35%) were more likely to visit the countryside or villages than first timers (21%)

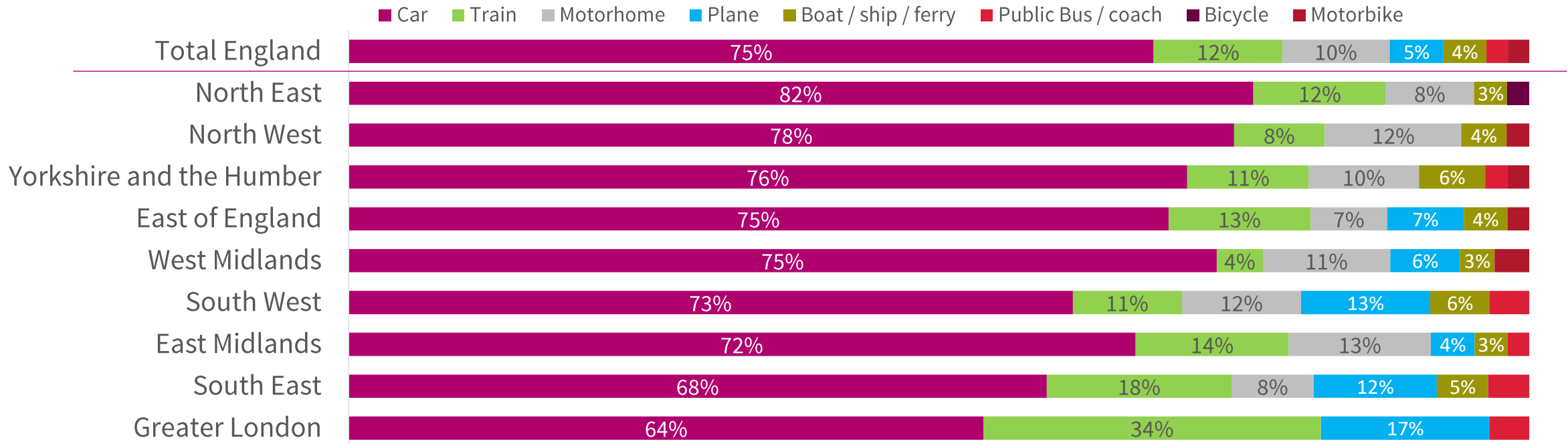
First-time visitors (38%) were more likely to visit lochs or rivers than repeat visitors (24%).

METHOD OF TRAVEL TO SCOTLAND (BY ENGLISH REGION)

By car was the most common transport mode to travel to Scotland for all regions of England, but was particularly prevalent amongst visitors from the North East and North West.

The next most common form of transport were by train, followed by motorhome.

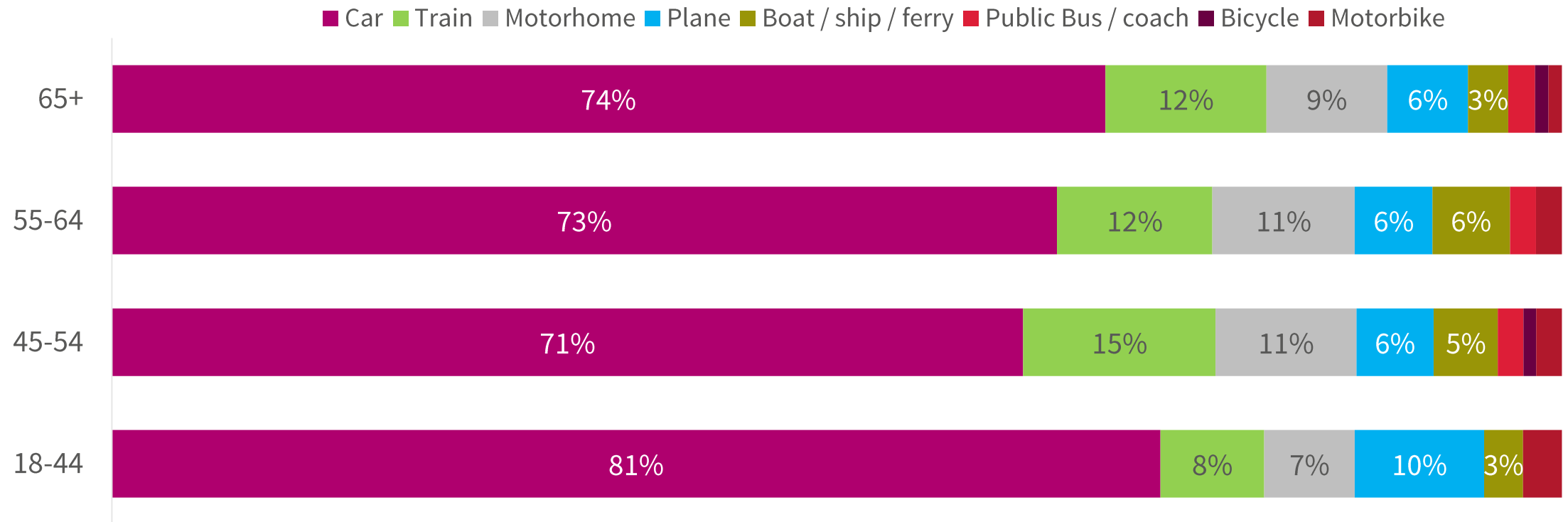
Visitors from Greater London and the South East were the least likely to travel to Scotland by car, although car was still the most prevalent method of transport. These visitors were more likely than average to travel by train or plane.



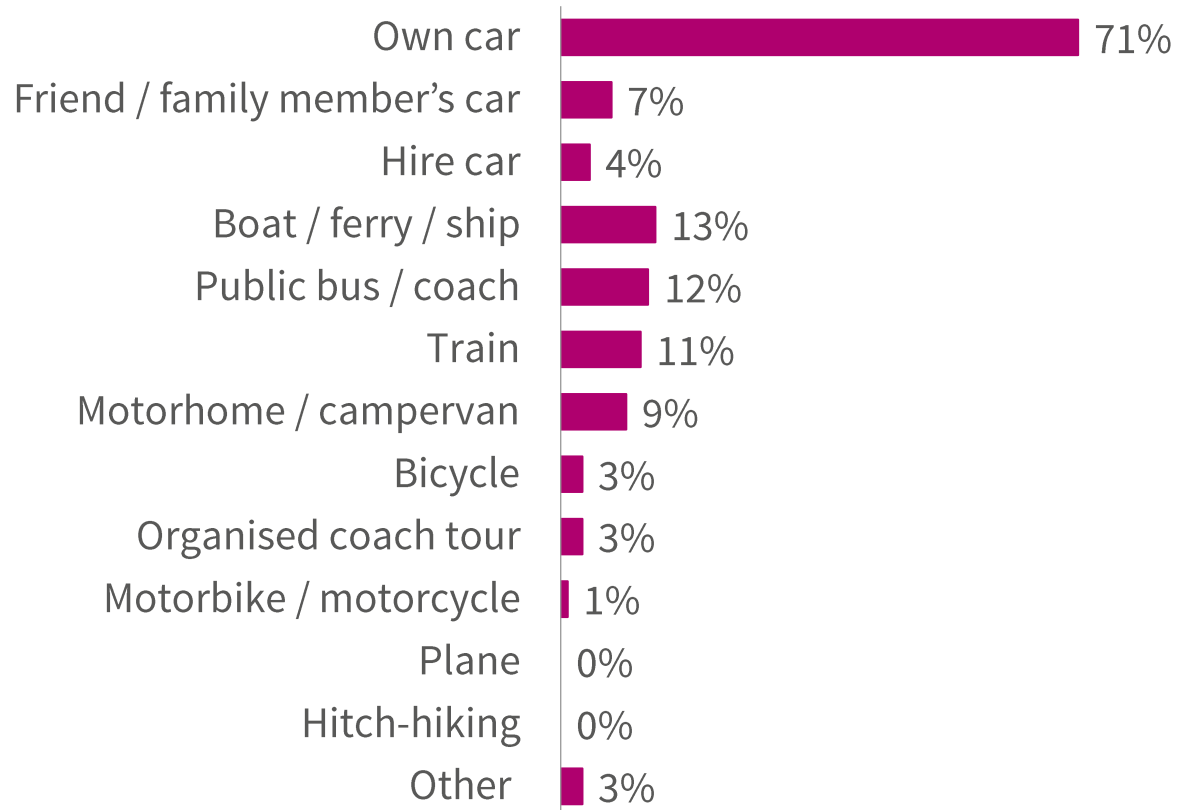
METHOD OF TRAVEL TO SCOTLAND – BY AGE

Methods of transport to Scotland were generally consistent by age.

Those in the 55-64 age group were more likely than older visitors (65+) to travel by boat/ship/ferry.



METHOD OF TRANSPORT USED WITHIN SCOTLAND



The majority travelled within Scotland using a car, and around one in ten travelled within Scotland by boat/ship/ferry, public bus/coach, train and/or motorhome/campervan.

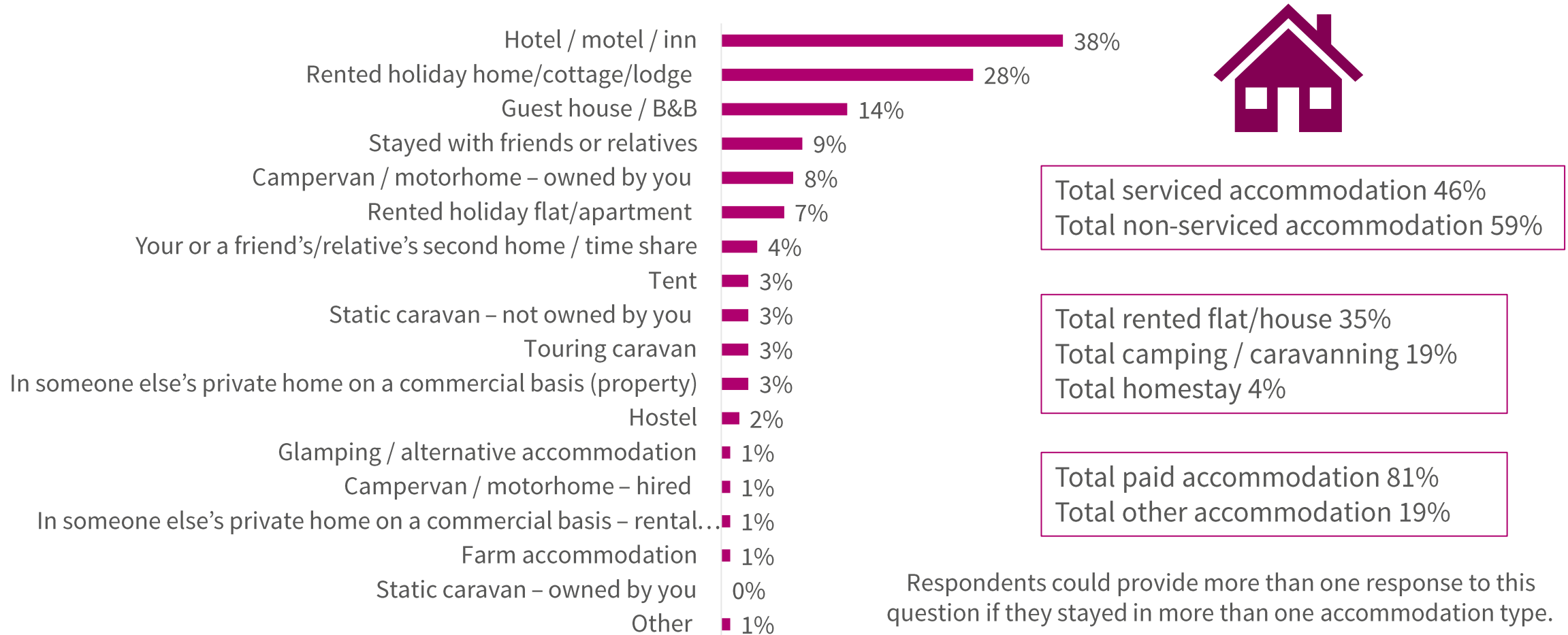
In total, 19% travelled by public transport (bus, train). This proportion was higher amongst first time visitors (32%) than repeat visitors (18%).

ACCOMMODATION TYPES

The majority of visitors, just under six in ten, opted for non-serviced accommodation (mostly self-catering).

Hotels were the most common form of serviced accommodation, with almost four in ten reporting they had stayed in one.

Just under a fifth cited camping/caravanning, including 8% that stayed in a campervan/motorhome that they owned.

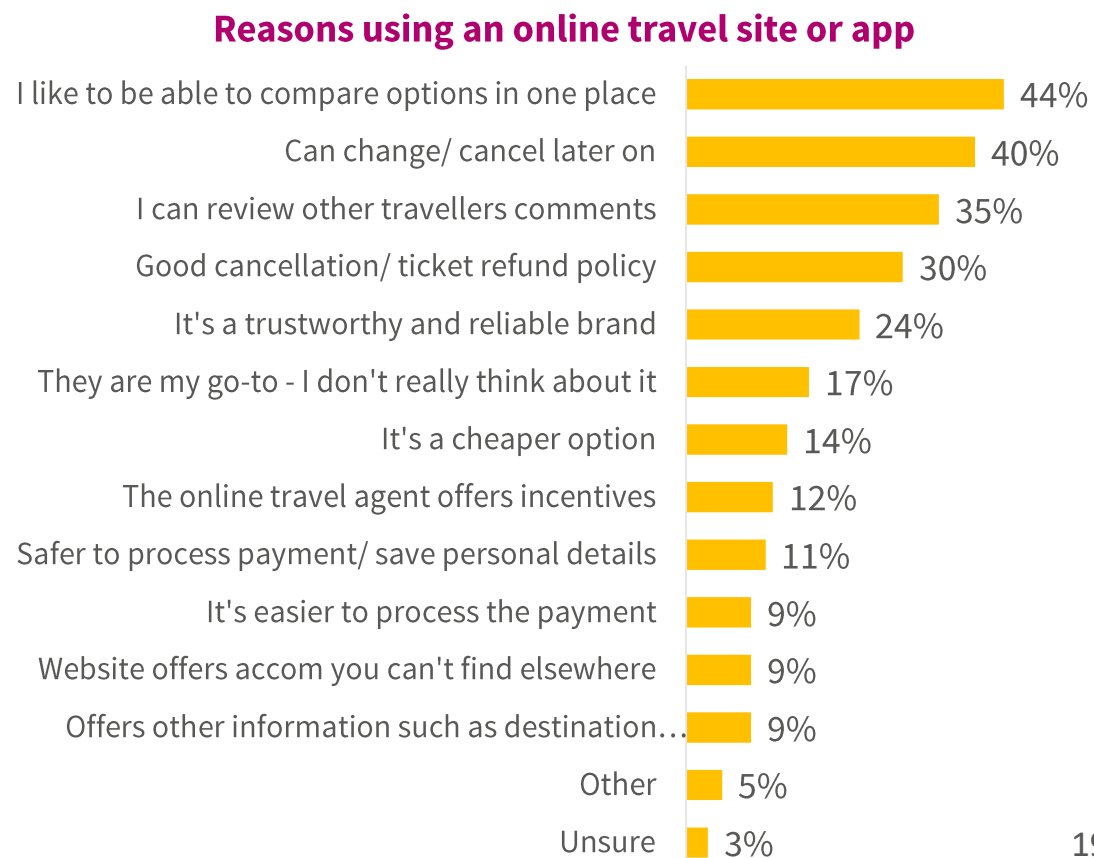
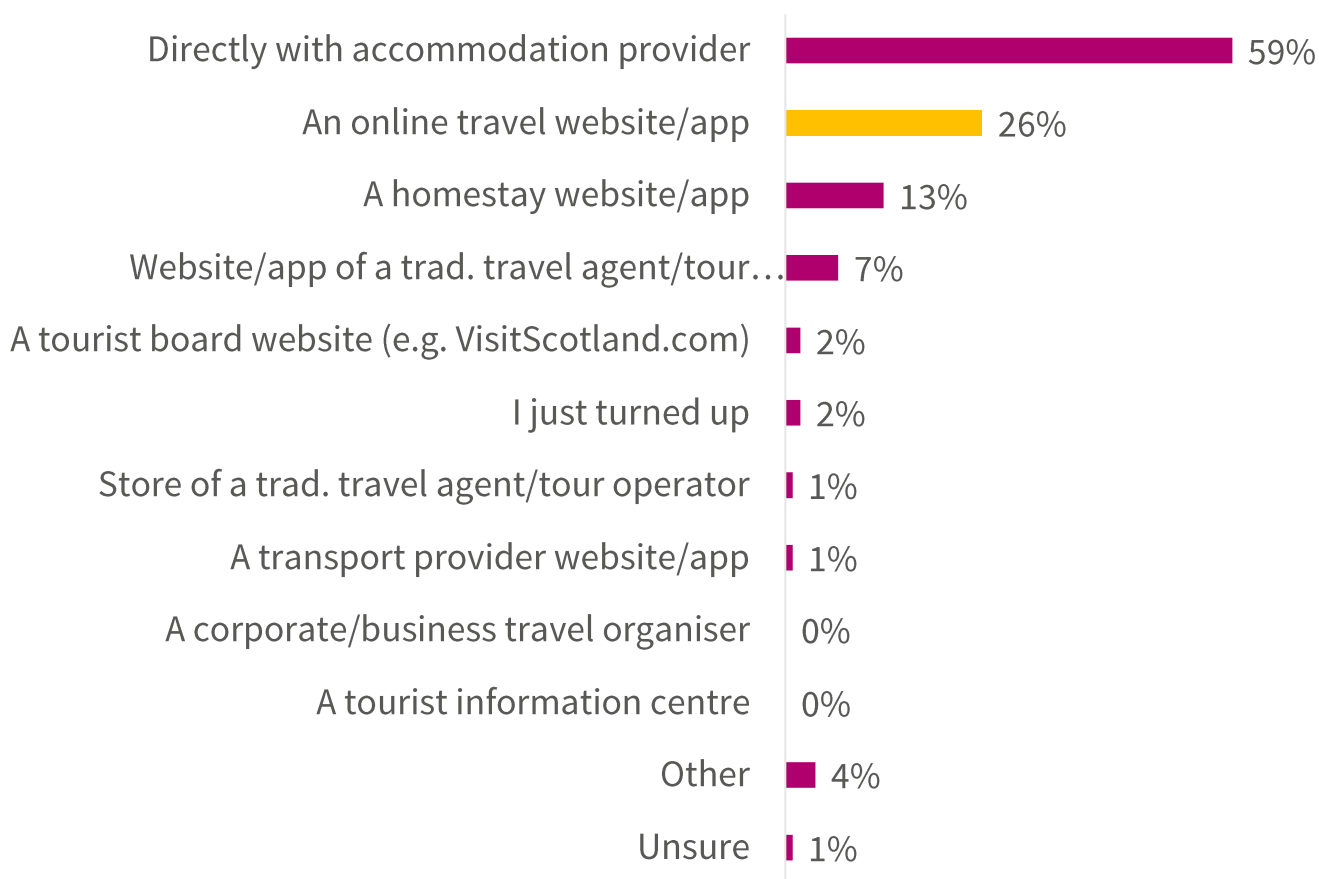


Respondents could provide more than one response to this question if they stayed in more than one accommodation type.

METHOD OF BOOKING ACCOMMODATION (1)

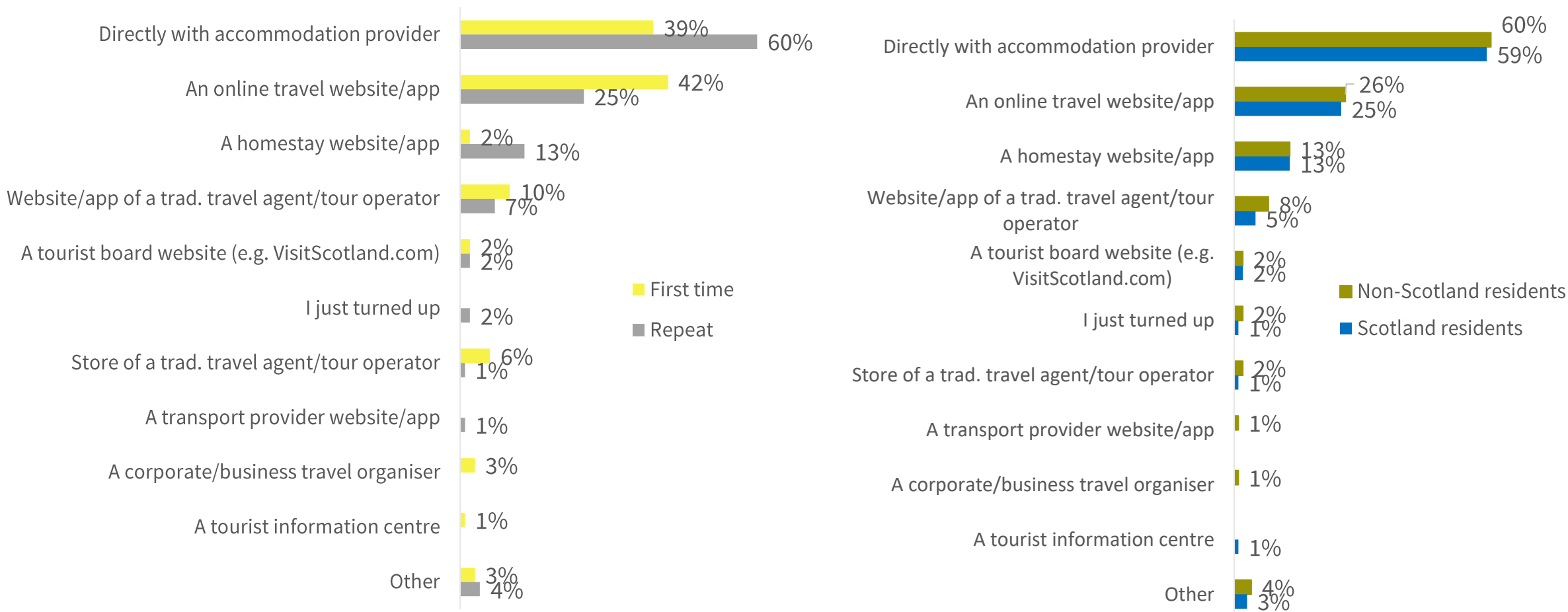
Respondents who stayed in paid for accommodation were asked how they booked. More than half booked directly with the provider, while just over a quarter used the website or app of an online travel company.

The main reasons for people using online travel websites/apps were to compare options in one place and to be able to change/cancel later on, and the availability of viewing other users' reviews.

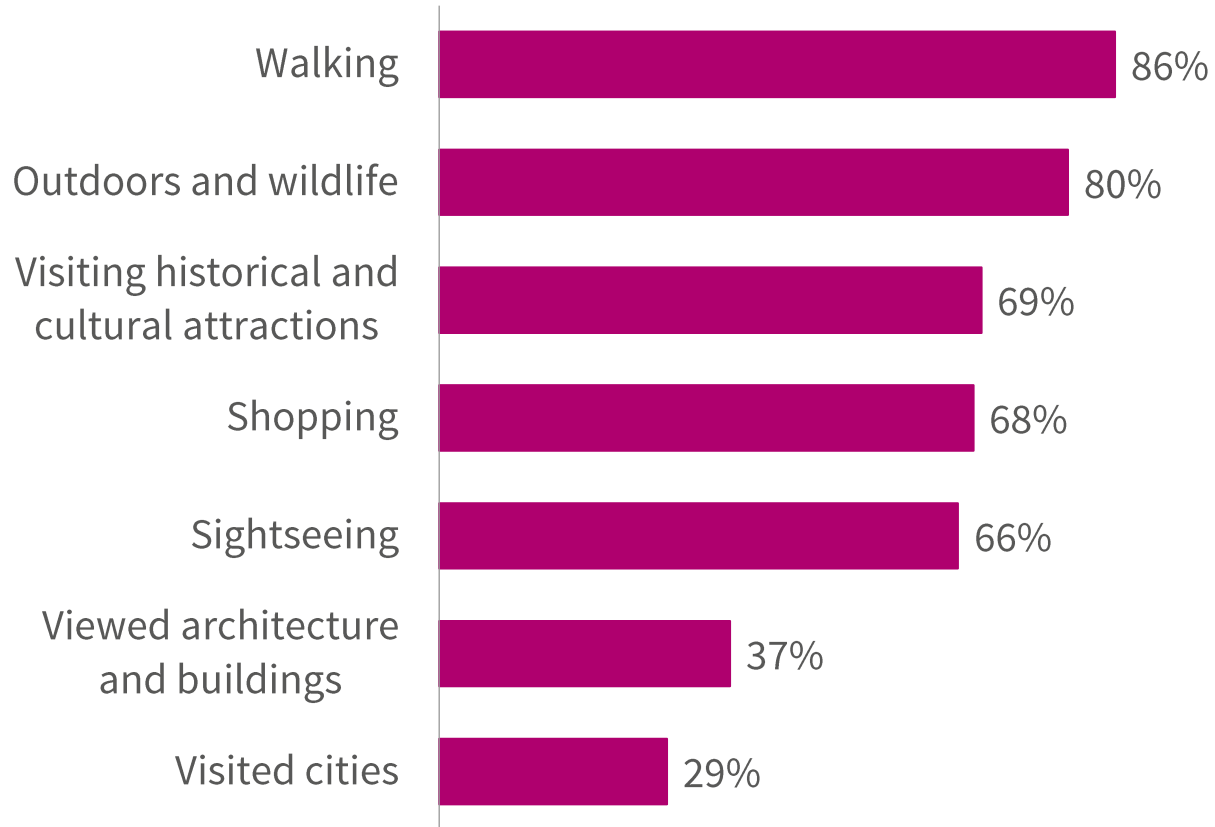


METHOD OF BOOKING ACCOMMODATION (2)

Repeat visitors were more likely to book directly with the accommodation provider or use a homestay website than first time visitors. First time visitors were more likely to use an online travel website/app.



TOP ACTIVITIES (1 GROUPED CATEGORIES)

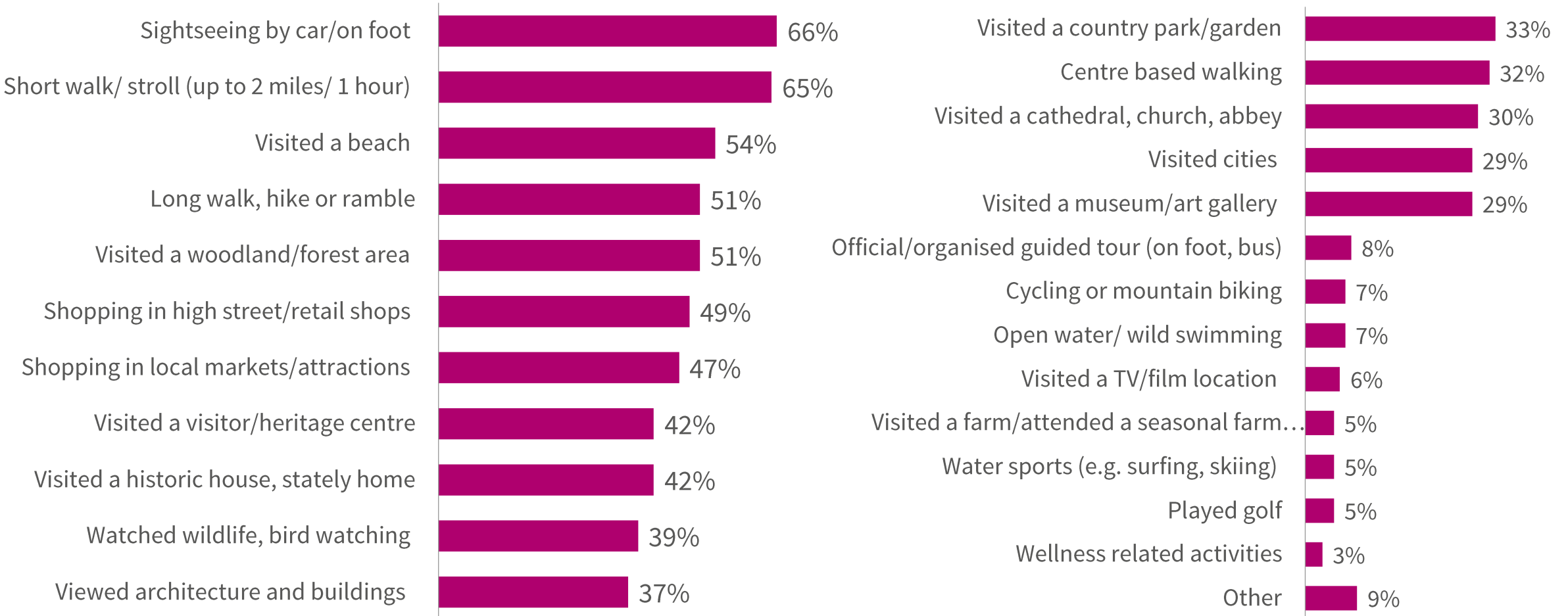


Almost nine in ten visitors enjoyed some form of walking (i.e., short strolls, long hikes) during their trip.

Eight in ten enjoyed the outdoors/wildlife, confirming earlier findings that people were most likely to spend time in rural, coastal, and countryside locations.

ACTIVITIES PARTICIPATED IN 2022 (2 ALL ACTIVITIES)

Several activities were mentioned by over half of visitors, the most common of which were sightseeing and a short walk. Other popular activities included visiting a beach, a long walk/hike, and visiting a woodland/forest area.



Q21. Did you take part in any of the following activities during this trip in Scotland? All Visitors (1,967)

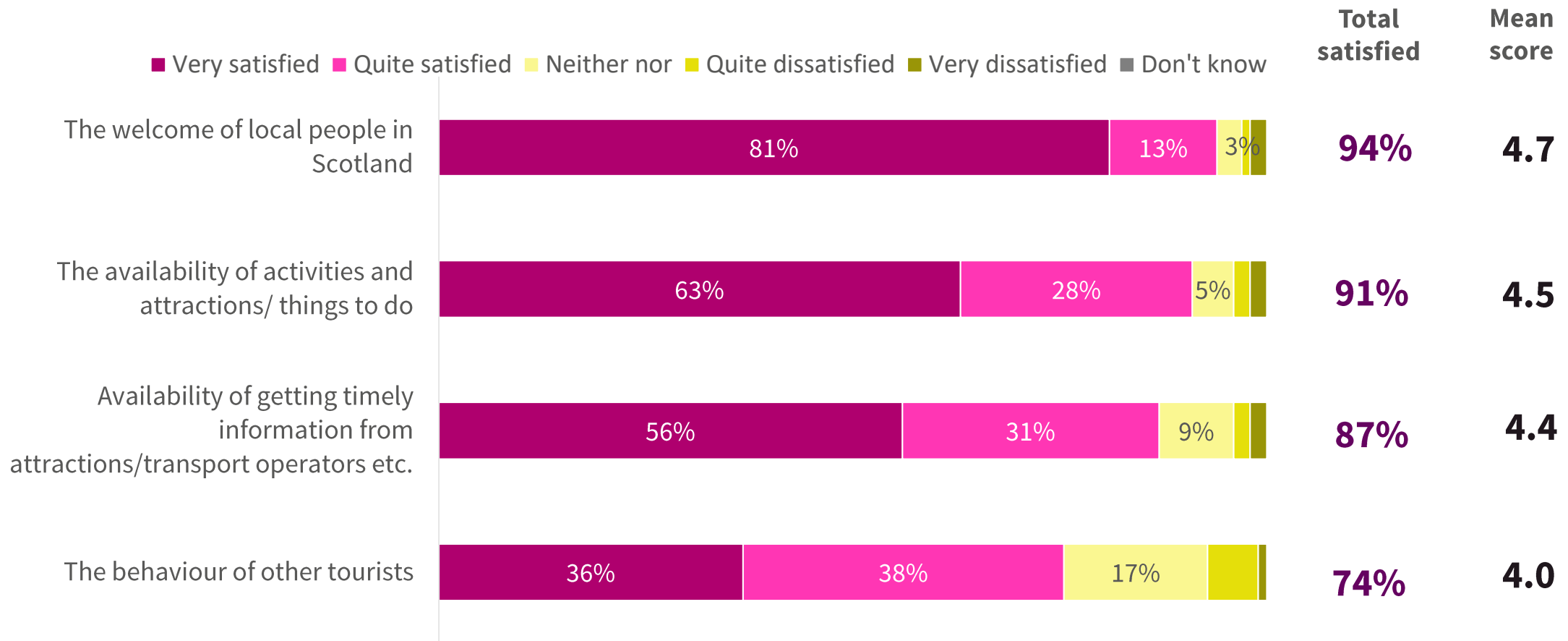
PLANNING AND BOOKING SUMMARY

- 1. The key motivations for taking a holiday imply a need for escape from everyday life (getting away from it all and connecting with nature and the outdoors). There was also a desire to go somewhere familiar.** The top response was revisiting somewhere I had a good experience before.
- 2. Motivations for taking a holiday varied by visitor type.** First-time visitors were more likely to want to travel somewhere new or learn something new. Repeat visitors wanted to revisit somewhere or not travel overseas. Scotland visitors were more likely to want a change of environment, want to support tourism businesses, enhance their mental health and not travel too far than non-Scotland visitors.
- 3. 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.
- 4. There was a clear preference for travelling to Scotland by car, although significant proportions travelled by train and motorhome.**
- 5. A higher proportion used non-serviced accommodation (59%) than serviced accommodation (46%), although the single most common accommodation type was a hotel/motel/inn.**
- 6. People who booked paid-for accommodation tended to either book directly with their accommodation provider, particularly repeat visitors, or through an online travel website/app, particularly first-time visitors.**

SATISFACTION WITH ASPECTS OF TRIP

Respondents were asked how satisfied they were with specific aspects of their trip.

There were high levels of satisfaction with most aspects of the trip experience, with more than nine in ten visitors reporting they were satisfied with the welcome of local people and the availability of things to do. There were lower levels of satisfaction with the behaviour of other tourists with just under three-quarters reporting satisfaction with this aspect.



2023 HOLIDAY INTENTIONS

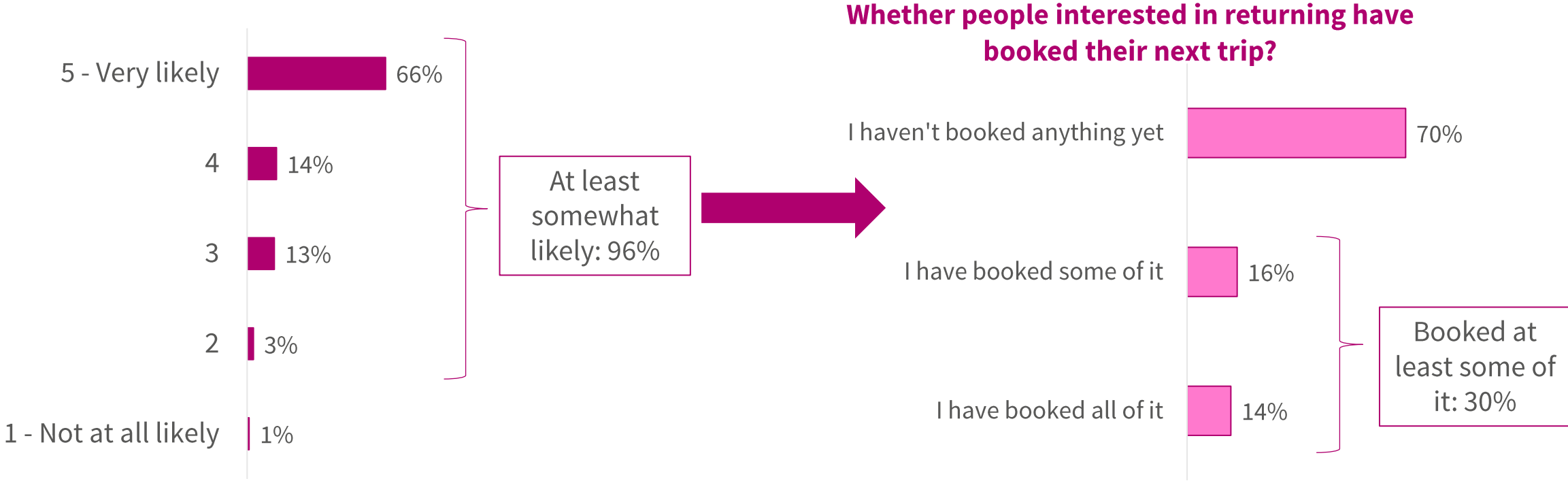


Image: Northern Lights at Mounthooley Dovecot, copyright @ VisitScotland

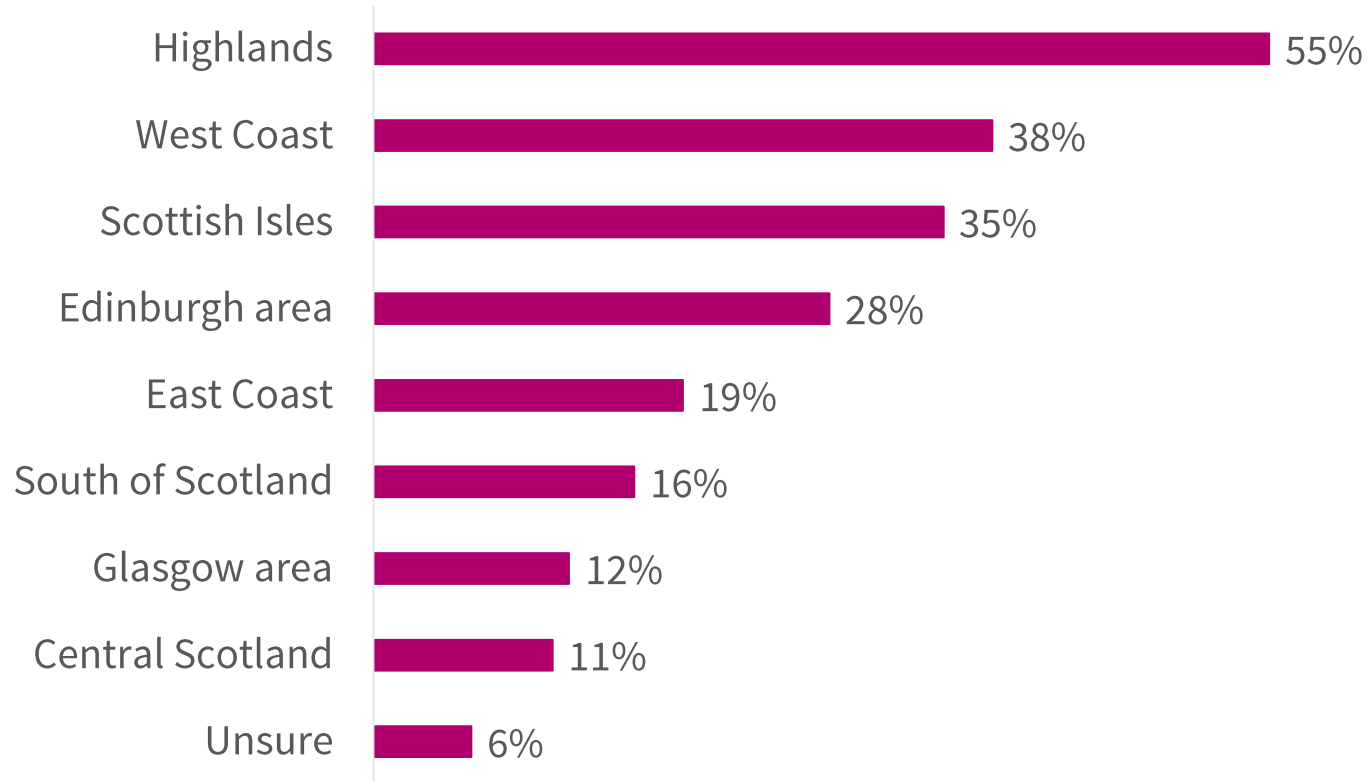
PLANS TO BOOK A TRIP TO SCOTLAND IN 2023

Two thirds of people said they were very likely to holiday in Scotland in 2023, with only 1% saying they were not at all likely. This was skewed by 2022 visitors (82% very likely to visit in 2023); however, even amongst non-visitors, the majority expected to holiday in Scotland in 2023 – 64% scored 4 or 5 out of 5.

Although most people that were likely to take a holiday in Scotland said they had not booked anything yet, nearly a third said they had booked at least some of it.



WHERE PEOPLE WOULD BE LIKELY TO STAY IN THE NEXT 12 MONTHS



2023

Most people knew which area they were likely to stay in and, in line with previous findings, the Highlands was, by some margin, the most popular destination for a trip in 2023.

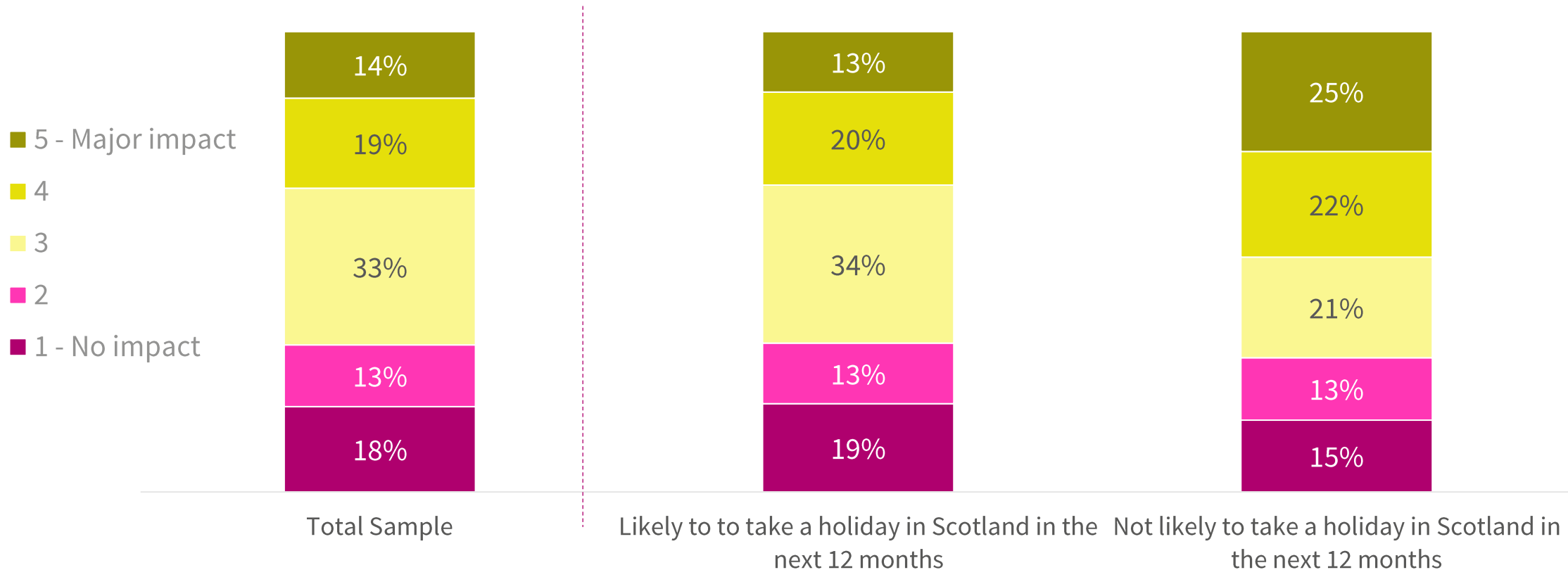
The next most likely areas people expect to visit were the West Coast and/or the Scottish Isles, while fewer expected to visit Glasgow, central and southern Scotland.

IMPACT OF COST OF LIVING ON 2023 HOLIDAYS

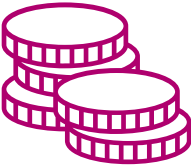
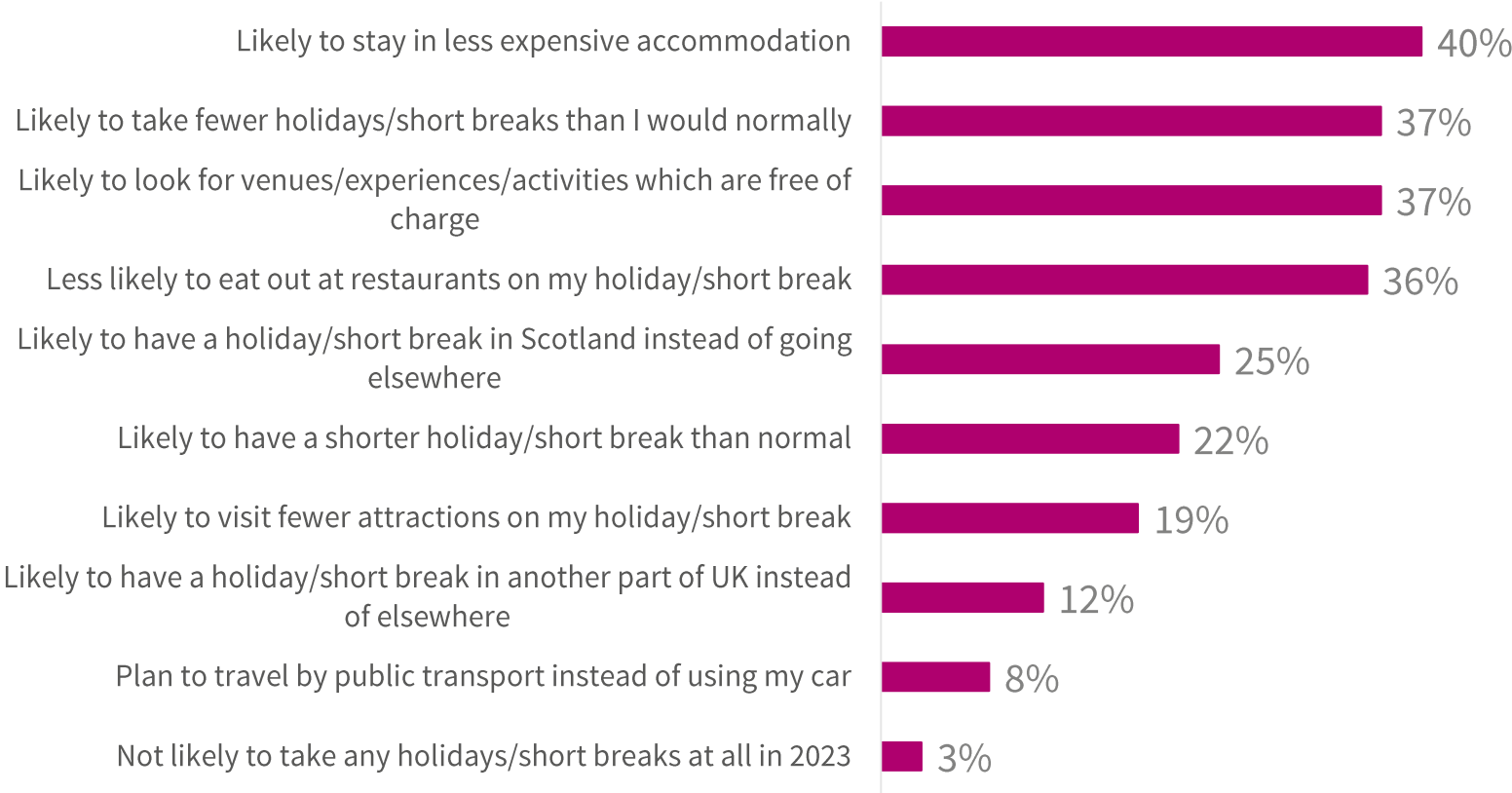
The majority of respondents (82%) expected restrictions on their household budget to have some impact on their holiday plans in 2023, with a third expecting it to have a considerable impact (score 4 or 5).

Those not likely to take a holiday in Scotland in the next 12 months were more likely to state that the cost of living crisis would have a major impact than those who reported they planned to visit Scotland in 2023.

Impact of cost of living and restrictions of household budget on 2023 holiday plans



IMPACT THE COST OF LIVING IS EXPECTED TO HAVE ON 2023 HOLIDAYS



Those that stated the cost of living would have an impact on their holiday plans expected that they would:

- stay in less expensive accommodation
- take fewer holidays
- eat out less often
- look for activities that are free of charge.

A quarter stated they would be likely to holiday in Scotland instead of going elsewhere.



APPENDIX

DISCLAIMER: 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 omission.

IMAGE CREDITS: All images are credited to VisitScotland unless stated, all rights reserved.

Created by Progressive Partnership Ltd. for VisitScotland, Insight department

CONTACT US:

Insight Department, VisitScotland
research@visitscotland.com

www.visitscotland.com
www.visitscotland.org

April 2023