

EAST BEACH, LOSSIEMOUTH

Scotland Visitor Survey 2015 & 2016

Connections To Scotland Extract

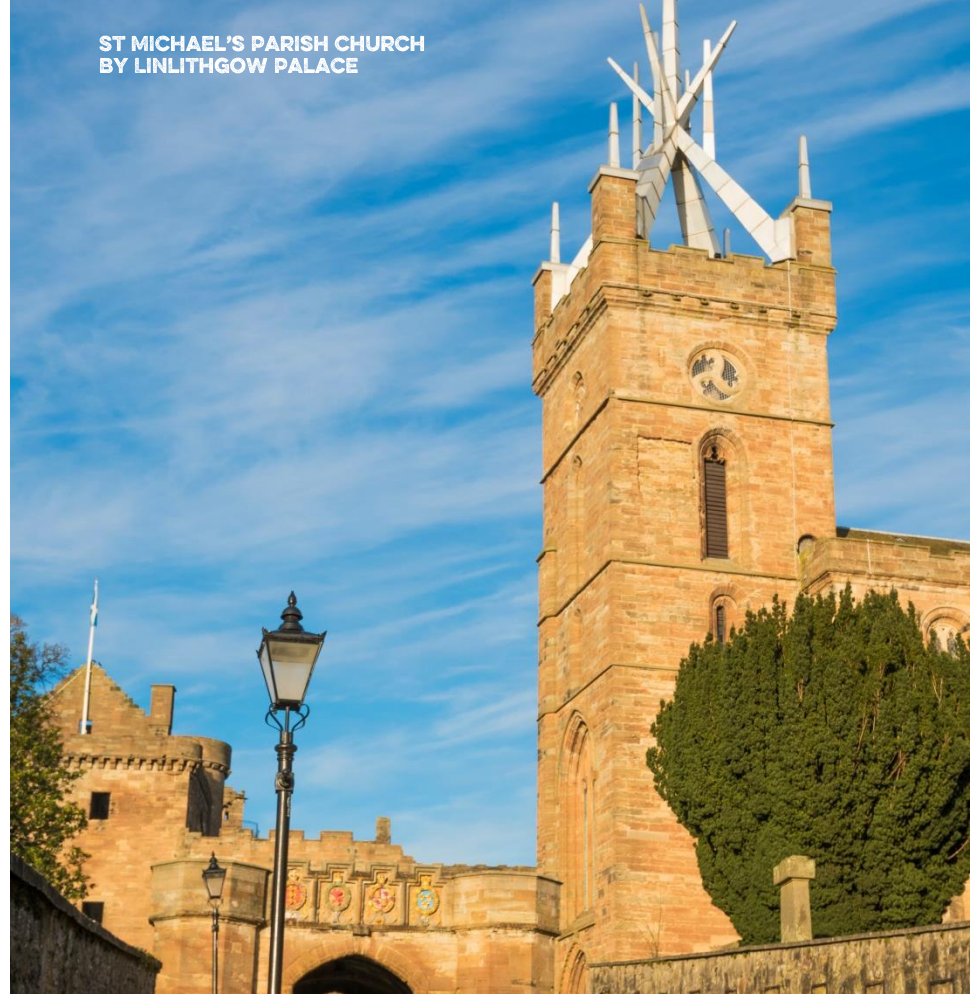


The following slides collate the insights relating to connections to Scotland only. To see the full survey and to put this extract into context please visit www.visitscotland.org



- **VisitScotland regularly undertake Scotland-wide visitor surveys.** Past surveys have been undertaken in 2004/2005, 2007/2008 and 2011/2012
- **Survey content is updated each time it is undertaken to reflect changes in the consumer and market environment.** The survey can explore different areas of the visitor experience
- The 2015 & 2016 Scotland Visitor Survey is a **2 year** research programme covering 19 regions of Scotland
- The 2 year programme is required to gain robust sample sizes for reporting at a regional level
- The Scotland Visitor Survey is a **summer only survey**, and due to the scale of the project, it is not carried out for the full year. As such results reflect the views of the main holiday season visitors who were in Scotland during May-September

ST MICHAEL'S PARISH CHURCH
BY LINLITHGOW PALACE



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.



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)

Top driver consistent for all markets, but other interesting differences also exist

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

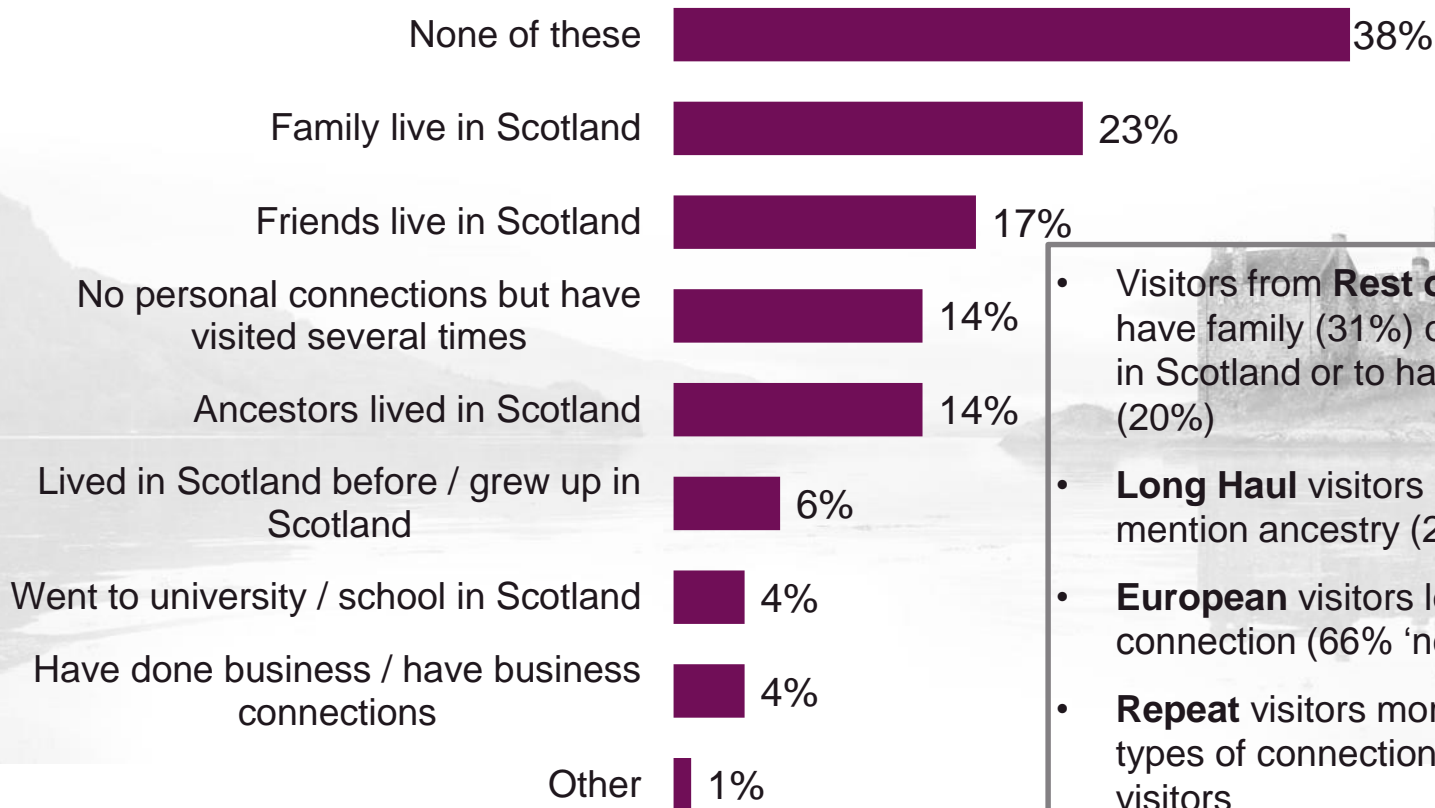
Top 3 Core Drivers

- Scenery & landscape (53%)
- History & culture (52%)
- A place I've always wanted to visit (34%)

Over-Index on:

- My Scottish ancestry (23%)

66% of visitors had an existing connection to Scotland



- Visitors from **Rest of UK** more likely to have family (31%) or friends (20%) living in Scotland or to have visited before (20%)
- **Long Haul** visitors most likely to mention ancestry (29%)
- **European** visitors least likely to have a connection (66% 'none')
- **Repeat** visitors more likely to have all types of connection than first time visitors

Q8 Before your trip, did you already have a personal connection with Scotland? Base: S1 All except Scot residents (8953)

	Aberdeen & Shire	Argyll & the Isles	Ayrshire & Arran	Cairngorms National Park	Dumfries & Galloway	Dundee & Angus	Edinburgh City	Fife	Glasgow City	Gr.Glasgow & Clyde Valley
Family live in Scotland	30%	23%	35%	23%	25%	27%	18%	32%	25%	23%
Friends live in Scotland	13%	20%	15%	16%	20%	19%	13%	13%	20%	20%
Ancestors lived in Scotland	12%	21%	15%	14%	16%	19%	17%	22%	20%	18%
Have lived in Scotland before/grew up in Scotland	6%	8%	13%	7%	7%	9%	5%	5%	5%	8%
Went to university/school in Scotland	4%	7%	7%	5%	4%	6%	4%	8%	5%	6%
Have done business there/have business connections there	3%	3%	4%	3%	3%	7%	4%	3%	3%	4%
No personal connections but have visited Scotland many times	17%	15%	26%	22%	30%	12%	11%	19%	12%	16%
Other	1%	2%	0%	1%	3%	1%	2%	1%	1%	0%
None of the above	32%	31%	24%	36%	26%	34%	44%	28%	35%	36%
BASE	496	314	142	208	159	166	1340	242	668	328

Q8 Before your trip, did you already have a personal connection with **Scotland**?

	Highlands	LLTNP	Lothians	Perthshire	Scottish Borders	SFFV	Orkney	Outer Hebrides	Shetland
Family live in Scotland	15%	16%	37%	30%	30%	22%	17%	20%	23%
Friends live in Scotland	11%	13%	24%	17%	16%	12%	12%	15%	16%
Ancestors lived in Scotland	18%	15%	16%	15%	21%	21%	21%	25%	24%
Have lived in Scotland before/grew up in Scotland	5%	5%	9%	10%	9%	5%	5%	6%	10%
Went to university/school in Scotland	4%	5%	4%	4%	5%	2%	3%	2%	6%
Have done business there/have business connections there	2%	1%	4%	4%	8%	6%	3%	1%	3%
No personal connections but have visited Scotland many times	13%	15%	8%	17%	22%	13%	26%	23%	23%
Other	1%	1%	-	1%	3%	1%	2%	0%	0%
None of the above	48%	47%	33%	32%	29%	35%	28%	25%	26%
BASE	1231	266	103	351	146	361	234	163	124

Q8 Before your trip, did you already have a personal connection with **Scotland**?

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

For further information please contact:

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