

SCOTLAND VISITOR SURVEY 2023

TRANSPORT (40 SLIDES)

1. How did visitors travel to Scotland and around Scotland?
2. How did visitors book their transport?
3. Use of public transport (including reasons for using or not using)
4. How satisfied were visitors with public transport?

Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023
- The sample comprises leisure overnight visitors only
- The data is weighted to reflect the profile of visitors to Scotland and it's regions



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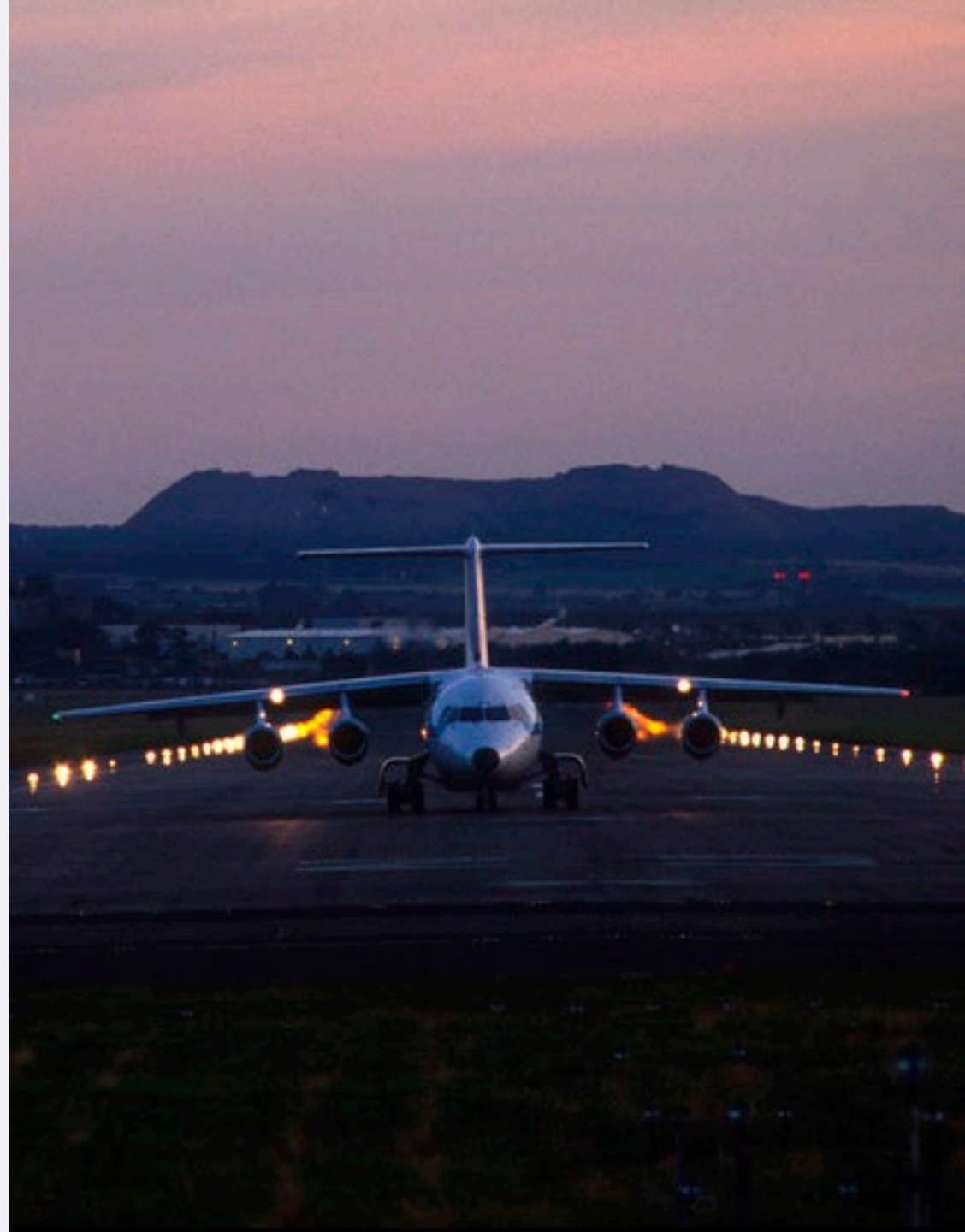
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Key Insights: Travel to Scotland

- Travel to Scotland continues to be dominated by car travel for UK visitors and by air travel for international visitors.
- Edinburgh and Glasgow are the main gateway cities for those arriving by air with a smaller proportion arriving at Inverness or Aberdeen airports.
- For UK visitors, there are some differences regionally, with those from Greater London and the South East also using plane and train connections to Scotland.
- 7 in 10 European visitors travelled by air and the majority of these came on a direct flight into Edinburgh. Dutch visitors, however, were more likely than other markets to be travelling by car and ferry to Scotland.
- For long haul visitors, 8 in 10 visitors travelled to Scotland by air with more travelling on an indirect flight (48%) than directly (35%).
- North American visitors are, however, more likely to be travelling on a direct flight than those from Australasia.



Key Insights:

Travel within Scotland

- Car travel still dominates travel around Scotland but there is a significant proportion who are using public transport. This is higher for those travelling within an urban location (or as part of touring around Scotland) compared with those staying more in rural or coastal locations.
- There are also differences by lifestage with pre-nesters more likely to travel by public transport driven by environmental concerns, cost and not having access to a car.
- In 2023, the majority of visitors who were using a car were using a petrol or diesel vehicle (84%). Although 12% were using hybrid vehicles, only 2% were driving pure electric vehicles for travelling around Scotland.
- Satisfaction with electric vehicle charging infrastructure was lower than for other aspects with a satisfaction score (out of 10) of 6.60 for availability of charging points and 6.80 for reliability of charging points.
- Even if electric hire cars had been available then only a fifth of visitors (who hired a car) stated they would want to hire electric.



Key Insights: Public transport

- Almost half of visitors in Scotland claimed to use some form of public transport on their trip within Scotland (49%) rising to 66% for European and long haul visitors. In our [trends work](#) we identified that train travel within Scotland may have added appeal to overseas visitors looking to reduce air miles by exploring the destination by rail.
- Train travel may also be seen as part of the trip experience. 27% of visitors stated that they chose public transport as they felt it would enhance their holiday. This may link to the trend for slow travel and meaningful experiences where the journey is part of the holiday.



Key Insights:

Public transport (continued)

- Satisfaction with public transport was high with visitors being generally very satisfied with their experience. In particular, the reliability of public transport and the ability to reach their destination were rated in the top two boxes by the majority, while no aspects were rated as dissatisfactory.
- Ratings provided by European visitors tended to be lower than for UK and long haul visitors, particularly value for money.
- Reasons for choosing public transport included that it was easier to get to places; more cost effective and more environmentally friendly. Some also said that it enhanced their holiday experience.
- Reasons given for not choosing public transport included lack of flexibility; that it was difficult and inconvenient for some to use i.e., due to luggage or impractical with the people in the travel party. Mentions were also made around the infrequency of services and length of time it would take. Overseas visitors were more likely to mention not being practical with luggage as a barrier.



1. Travel to Scotland

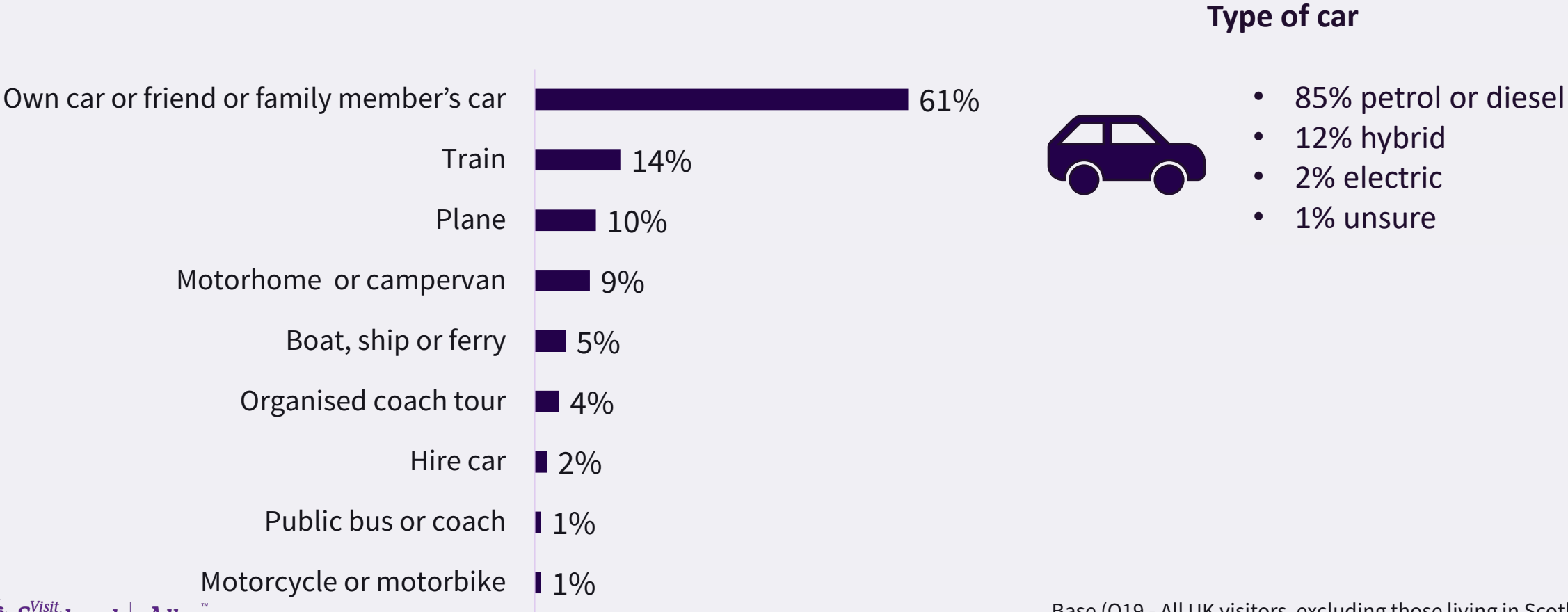
In this section, we wanted to understand how visitors travelled to Scotland.

- Whether by air, sea, road or rail
- Whether travel was direct or indirect to Scotland
- For air travel, which Scottish airports were arrival points
- For car users, what type of car was used?



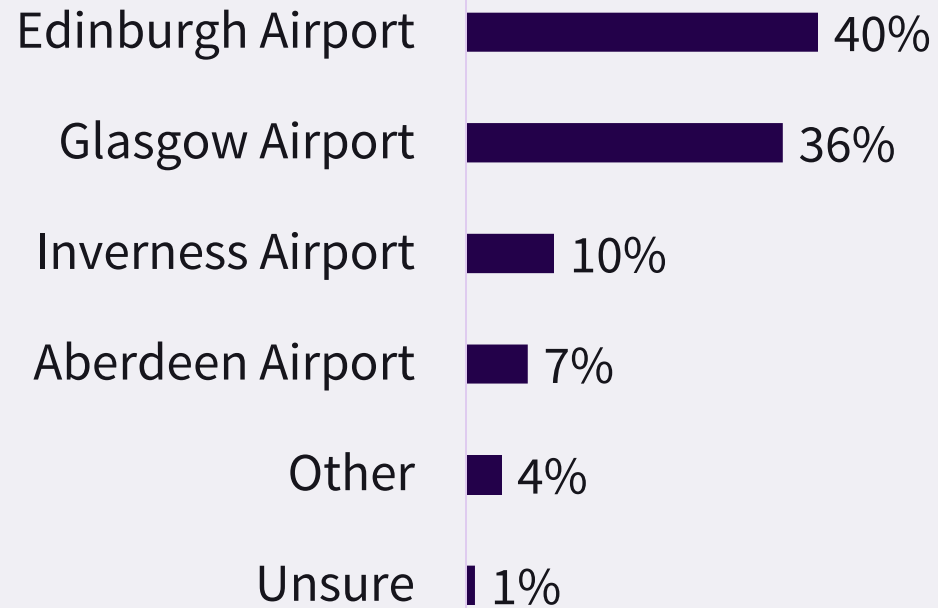
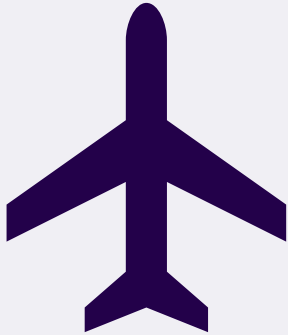
1.1 Travel to Scotland: UK Visitors (excluding Scotland visitors)

By car was the predominant way for visitors from the rest of the UK to travel to Scotland, with one in seven taking the train and one in ten travelling by plane or motorhome.

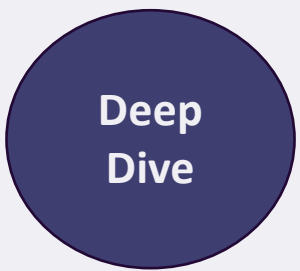


1.2 Arrival airport in Scotland: UK Visitors (excluding Scotland visitors)

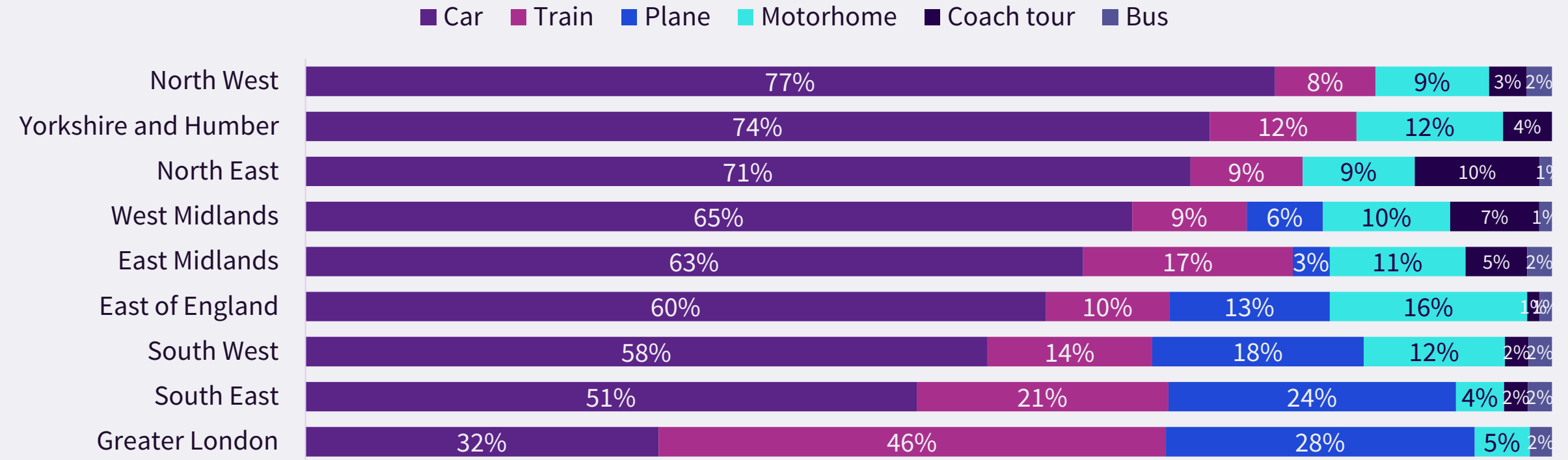
UK visitors travelling to Scotland by plane generally arrived at Edinburgh or Glasgow airports, with some also mentioning Inverness and Aberdeen airports.



1.3 Travel to Scotland: by English region

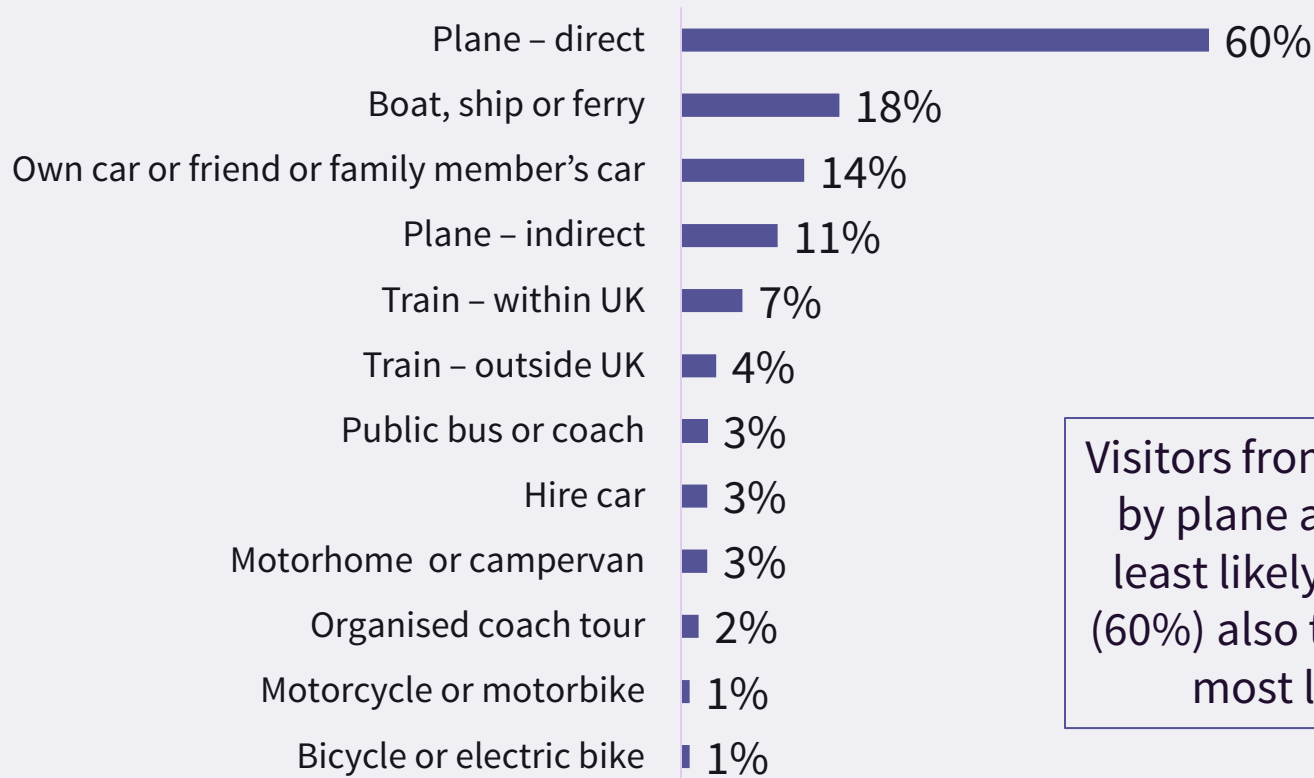


Visitors from northern England and Yorkshire were the most likely to Scotland travel by car, whilst those from London and the South East were the least likely, with many instead choosing to travel by plane or train. Coach tours were particularly popular for visitors from the North East.



1.4 Travel to Scotland: Europe Visitors

Seven in ten visitors from Europe travelled to Scotland by plane, most often on a direct flight. Almost a fifth travelled by ferry, with 17% travelling by car (either their own or hire).



Type of car

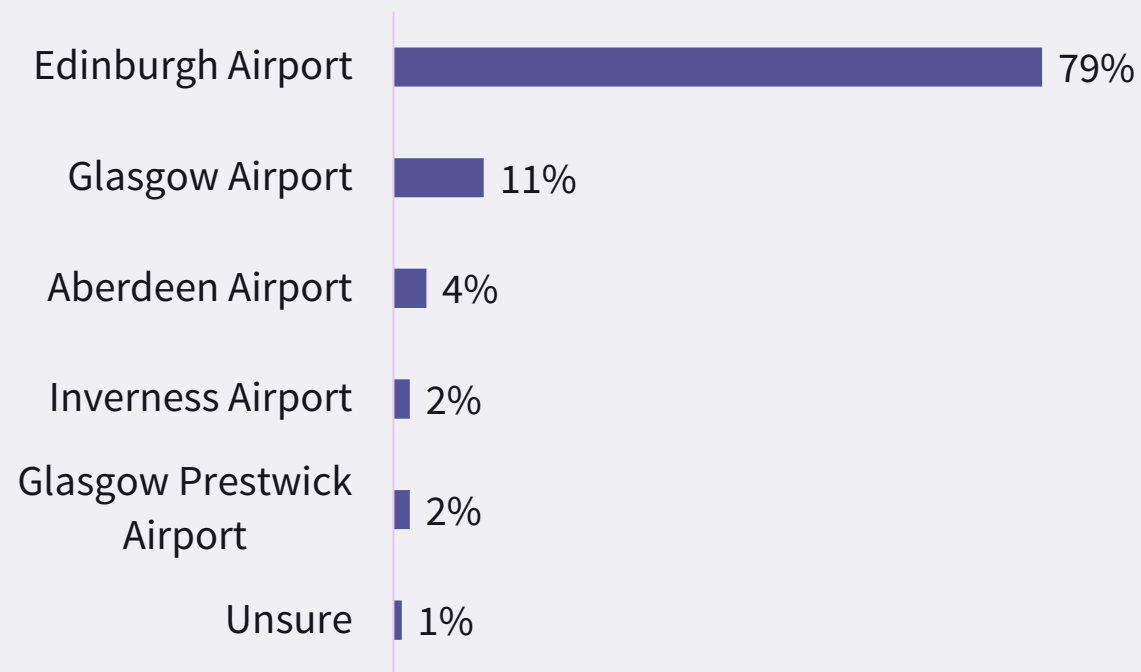
- 84% petrol or diesel
- 12% hybrid
- 3% electric

Visitors from Spain/Italy (92%) were the most likely to travel by plane and those from the Netherlands (40%) were the least likely. Most visitors from France (63%) and Germany (60%) also travelled by plane. Netherlands visitors were the most likely to travel by car (34%) and ferry (45%).

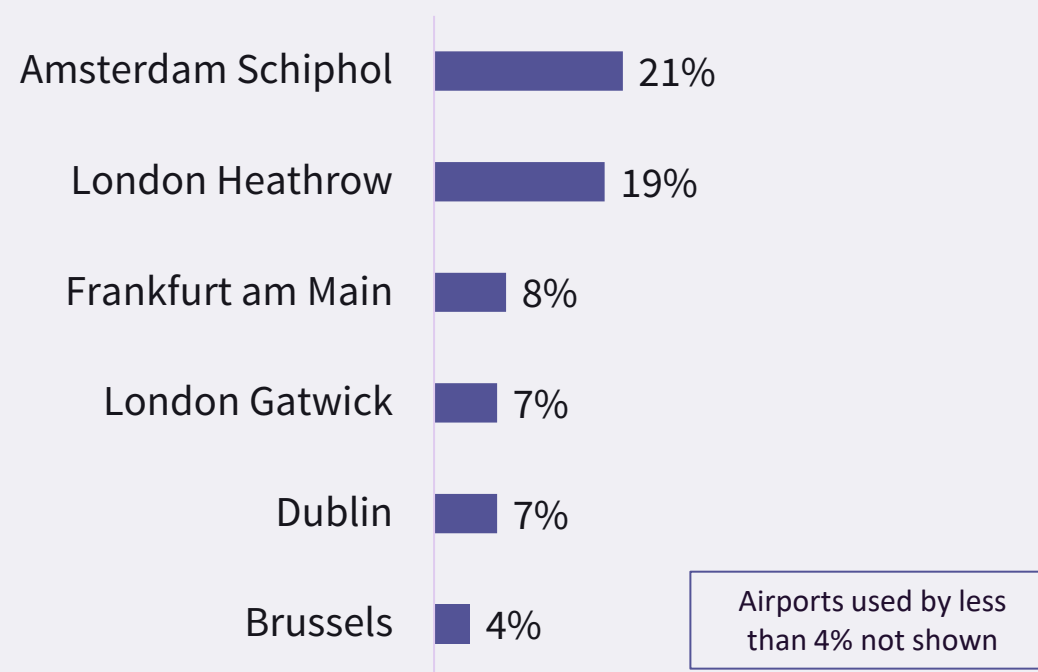
1.5 Arrival and connecting airports: Europe Visitors

The majority of Europe visitors who travelled by plane arrived directly into Edinburgh Airport. Of those who had a connecting flight, this was most likely to be via Amsterdam or Heathrow.

Arrival airport in Scotland

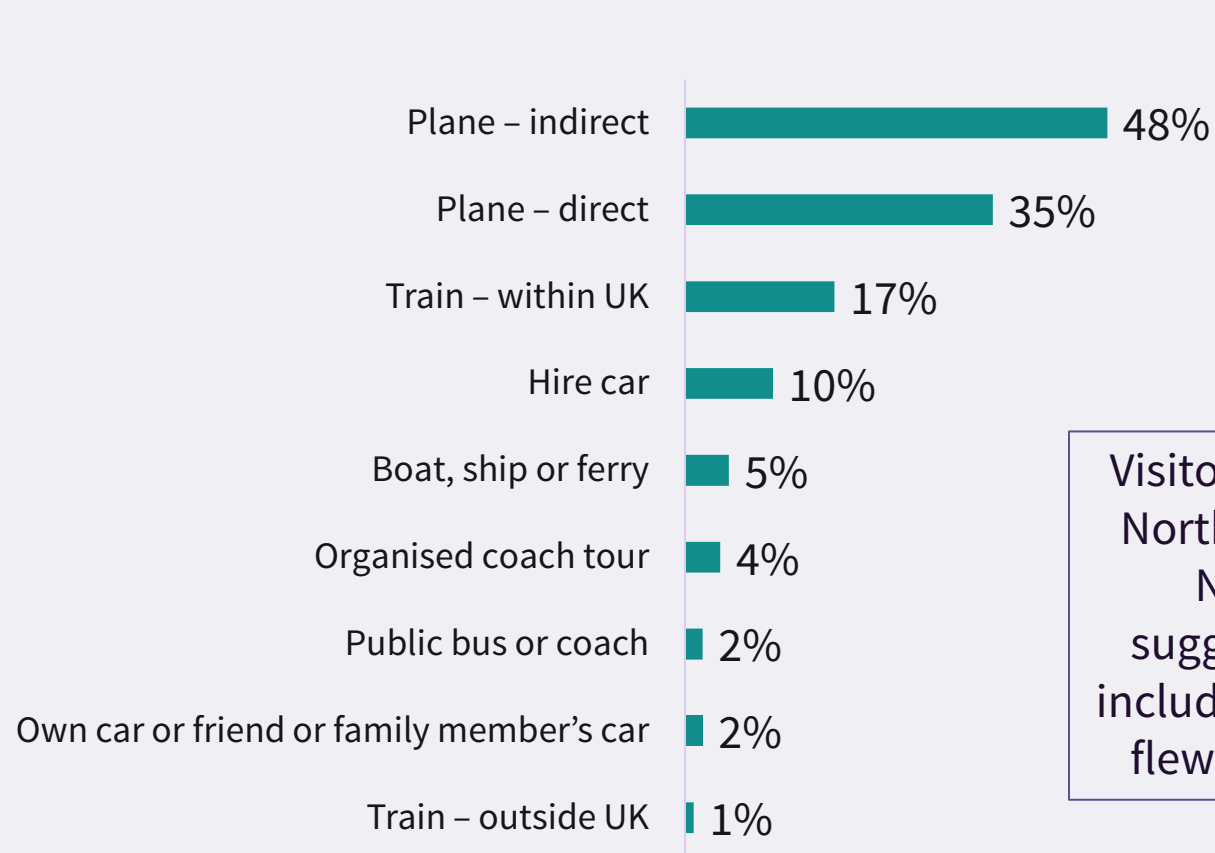


Connecting airports used for indirect flights



1.6 Travel to Scotland: Long haul Visitors

More than eight in ten long haul visitors travelled to Scotland by plane, with more flying indirectly than directly. One in six visitors reported that they travelled by train within the UK to reach Scotland.



Type of car

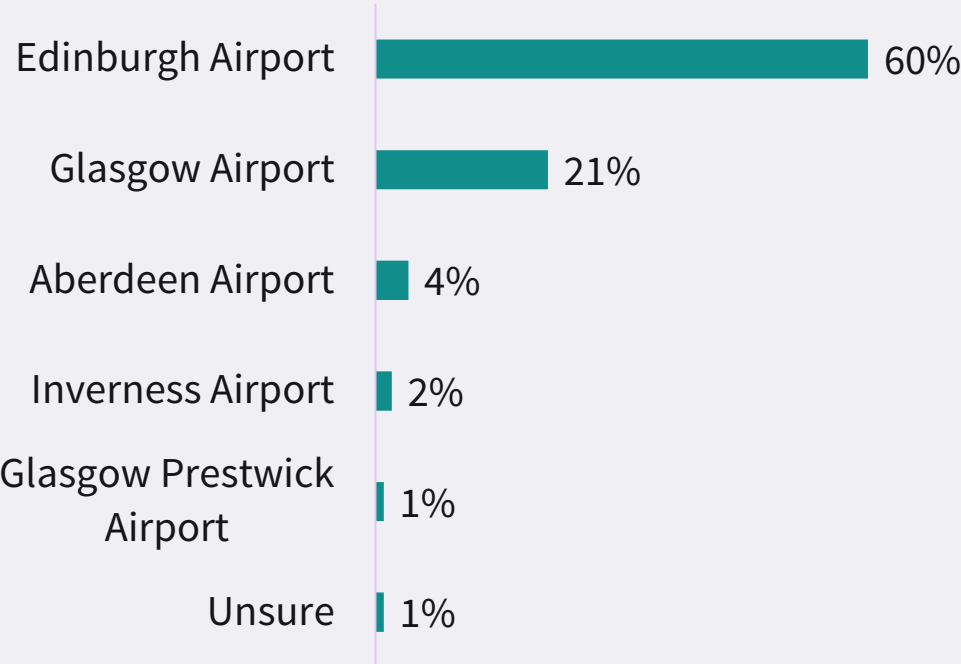
- 80% petrol or diesel
- 15% hybrid
- 1% electric
- 4% unsure

Visitors from Australasia were more likely than those from North America to travel to Scotland by train (25% vs 15% North America) or car (23% vs 9% North America) suggesting the visit to Scotland was part of a longer trip including other countries. More visitors from the USA (52%) flew indirectly compared to visitors from Canada (35%).

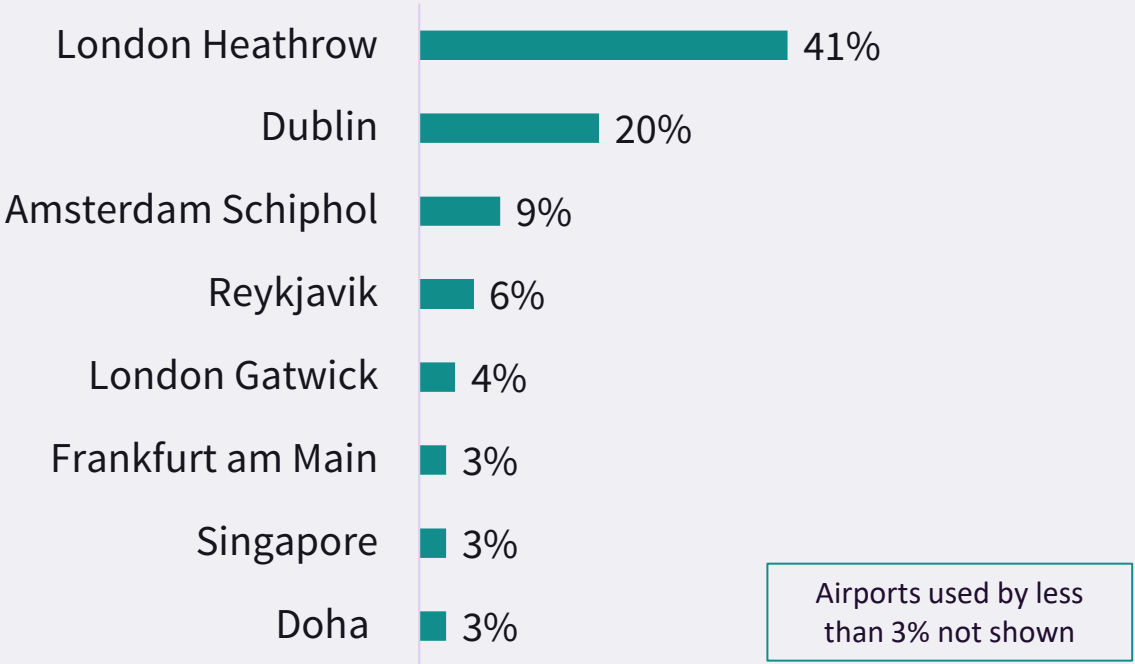
1.7 Arrival and connecting airports: Long haul Visitors

The majority of long haul visitors who travelled by plane arrived into Edinburgh Airport. Of those who had a connecting flight, this was most likely to be via Heathrow or Dublin.

Arrival airport in Scotland



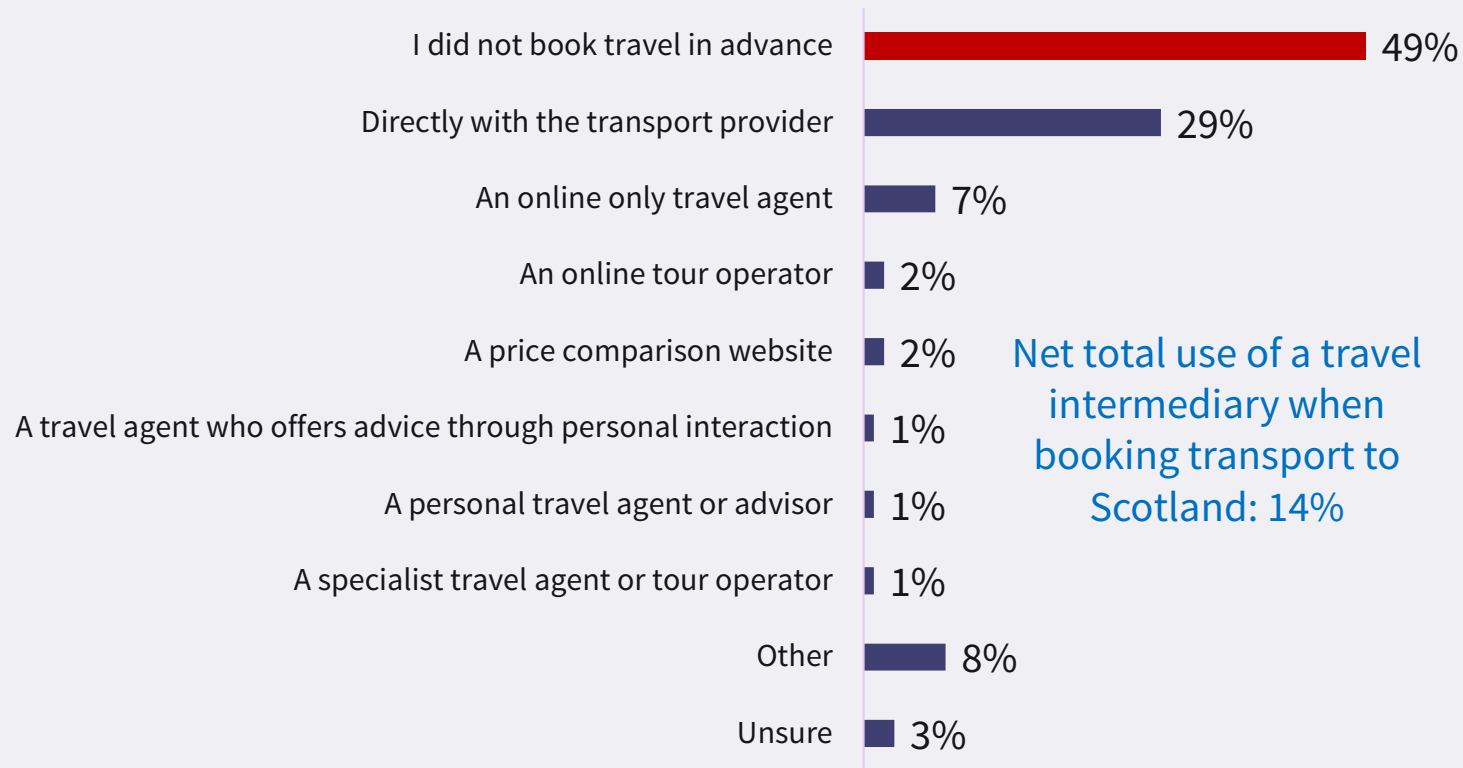
Connecting airports used for indirect flights



2.0 METHODS USED TO BOOK TRAVEL TO SCOTLAND

2.1 Methods used to book travel to Scotland: Rest of UK visitors

- For visitors from the rest of the UK (excluding Scotland residents) due to the high proportion travelling by car, there was no requirement to book transport in advance (49%).
- Of those who booked transport to Scotland for other UK regions, direct booking with transport providers and the use of OTAs are the most two popular methods.

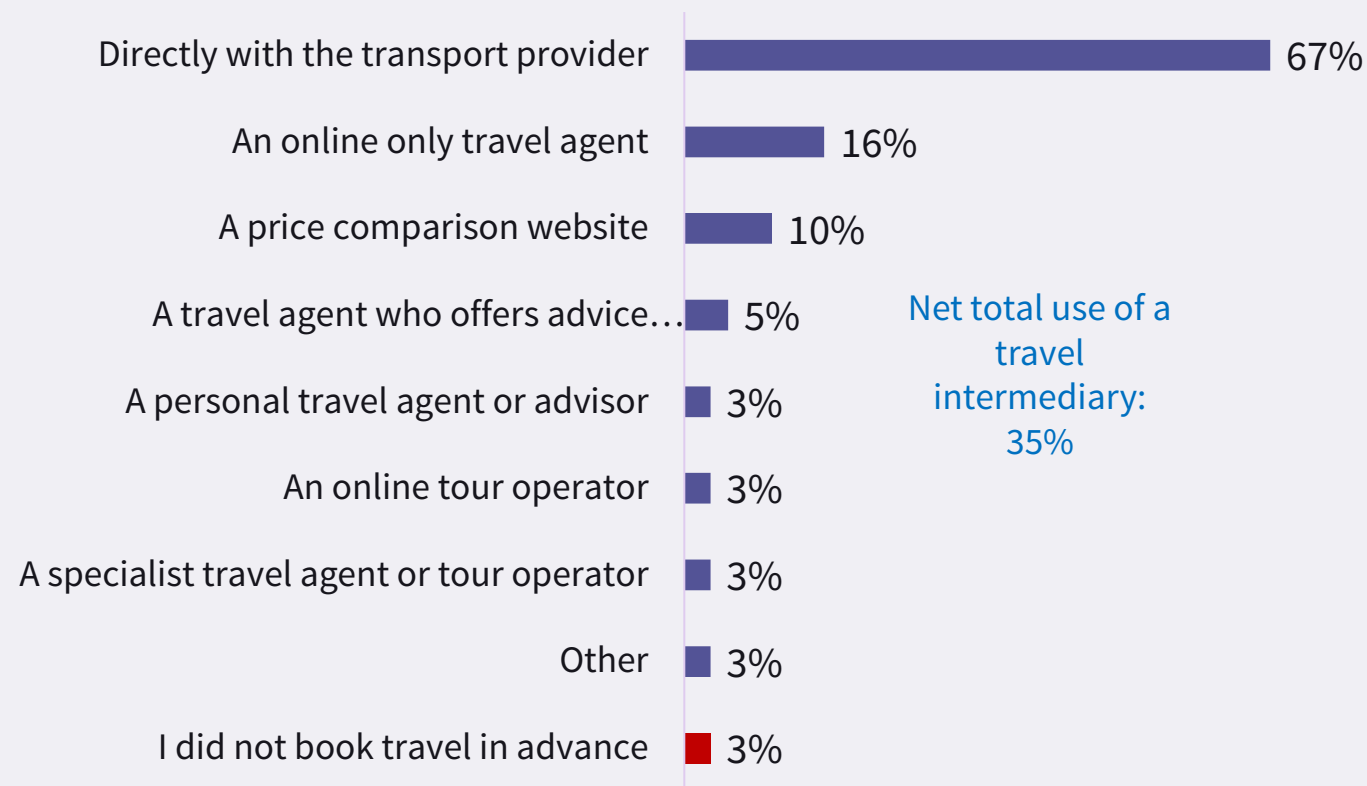


Other highlights in transport booking:

- **Pre-nesters** were more likely to book directly with the transport provider (52%) or using a price comparison website (11%) than other life stage groups. A similar pattern of response was noted for solo travellers.
- **First time visitors** are slightly more likely to book their travel to Scotland directly with transport providers (35% vs 28% repeat visitors).

2.2 Methods used to book travel to Scotland: Europe visitors

- Two thirds of visitors from Europe booked their travel directly with the transport provider, with 16% using an online travel agent and one in ten a price comparison website.
- In total, just over one in 3 used a type of intermediary for their transport booking to Scotland.

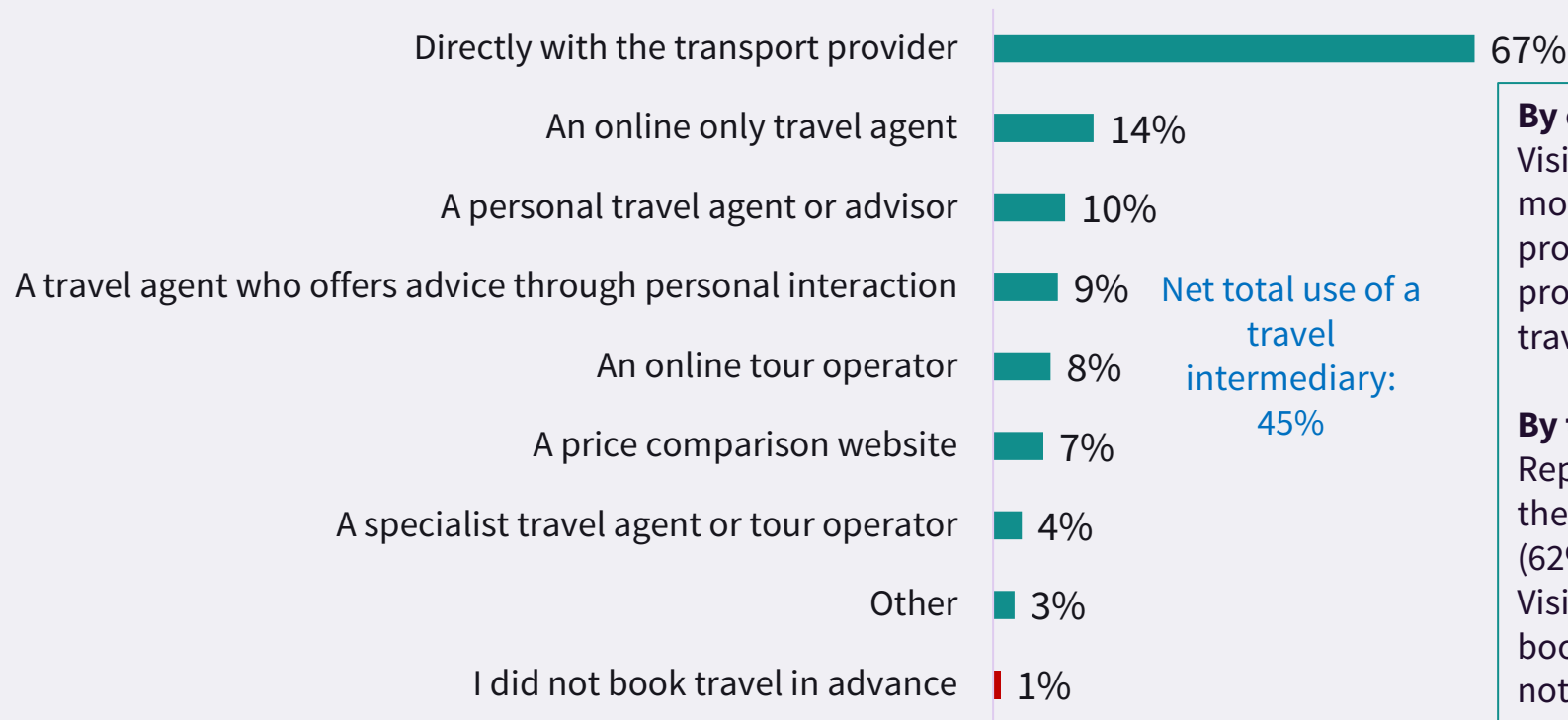


By profile of visitors:

- Visitors from Spain and Italy (59%) were less likely than visitors from Germany (74%) or the Netherlands (75%) to book directly with a transport provider.
- Pre-nesters were the most likely to book through price comparison website (20%), while retirement age visitors were the most likely to book via an online tour operator (14%).
- Repeat visitors were more likely to book directly with the transport provider (73%) than first time visitors (62%).

2.3 Methods used to book travel to Scotland: Long haul visitors

- Two thirds of long haul visitors booked their travel directly with the provider.
- 45% used a type of intermediary when booking their travel to Scotland.



By country of residence:

Visitors from USA (71%) and Canada (73%) were more likely to book directly with the transport provider than those from Australasia (51%). A higher proportion of Australasia visitors used an in-person travel agent (16%) compared to USA visitors (7%).

By type of visitors:

Repeat visitors were more likely to book directly with the transport provider (74%) than first time visitors (62%).

Visitors on the trip of a lifetime were more likely to book via an online tour operator (13%) than those not on the trip of a lifetime (6%).

3. Travel within Scotland

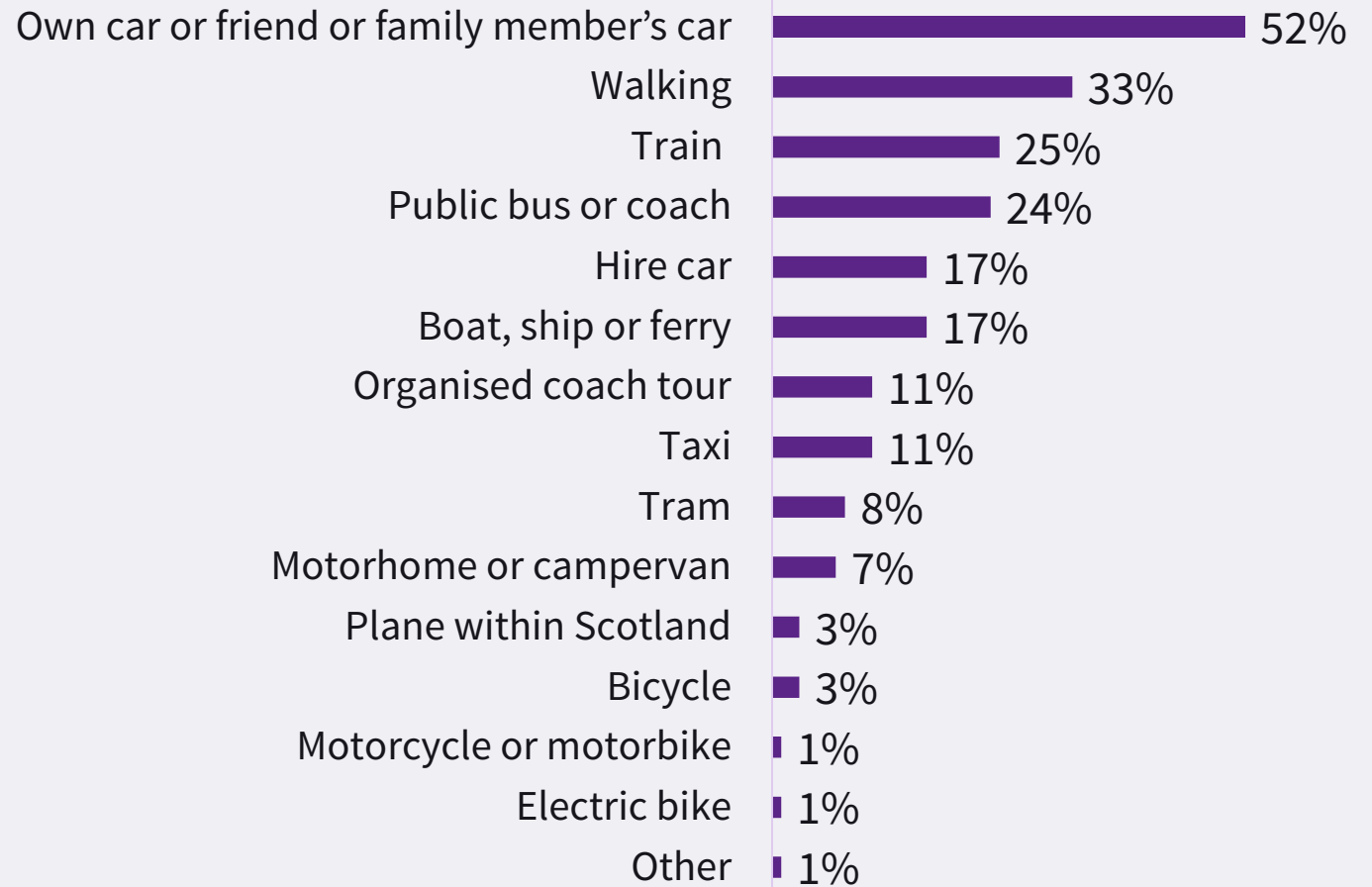
In this section, we wanted to understand how visitors travelled around Scotland:

- Methods of transport used
- For car users, what type of car was used?
- Satisfaction with electric car charging provision
- What proportion travelled using public transport?
- Satisfaction with public transport



3.1 Travel within Scotland: all markets

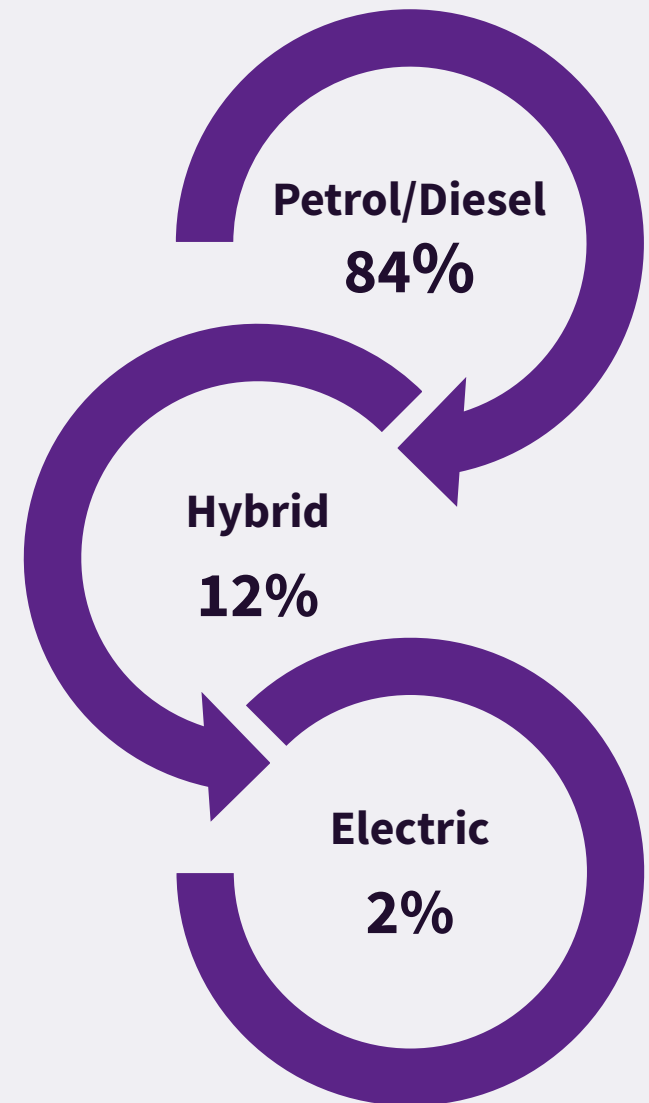
- The majority of visitors used a car (own car or hire car) to travel around Scotland (69%)
- Almost half used public transport at some point in their trip (49%) . A quarter stated train travel (25%) and/or travel by public bus or coach (24%)





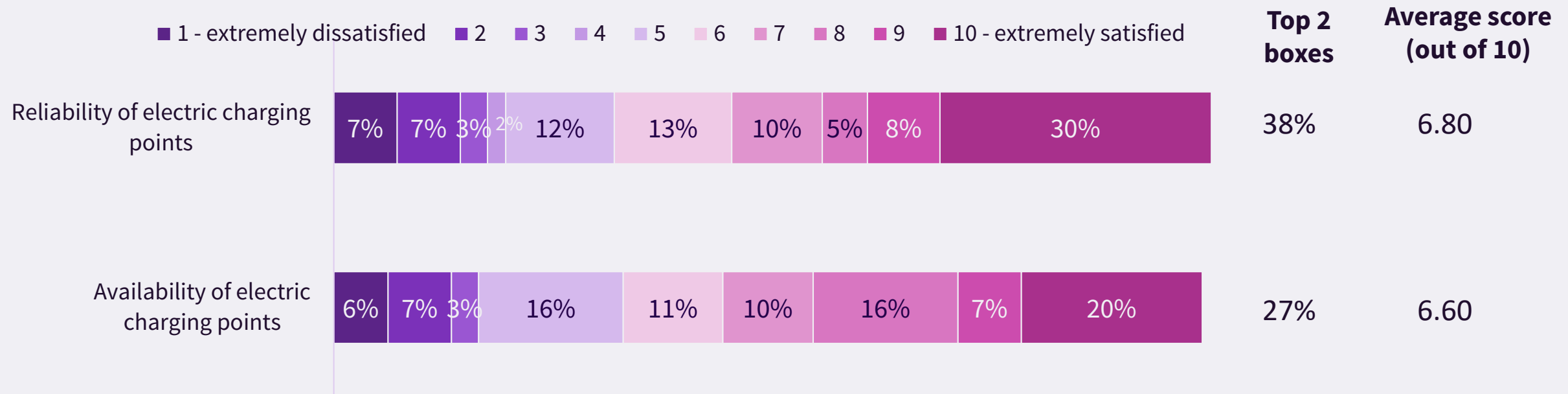
3.2 Type of car used

69% of
all visitors
used a car
on their trip
in Scotland
in 2023



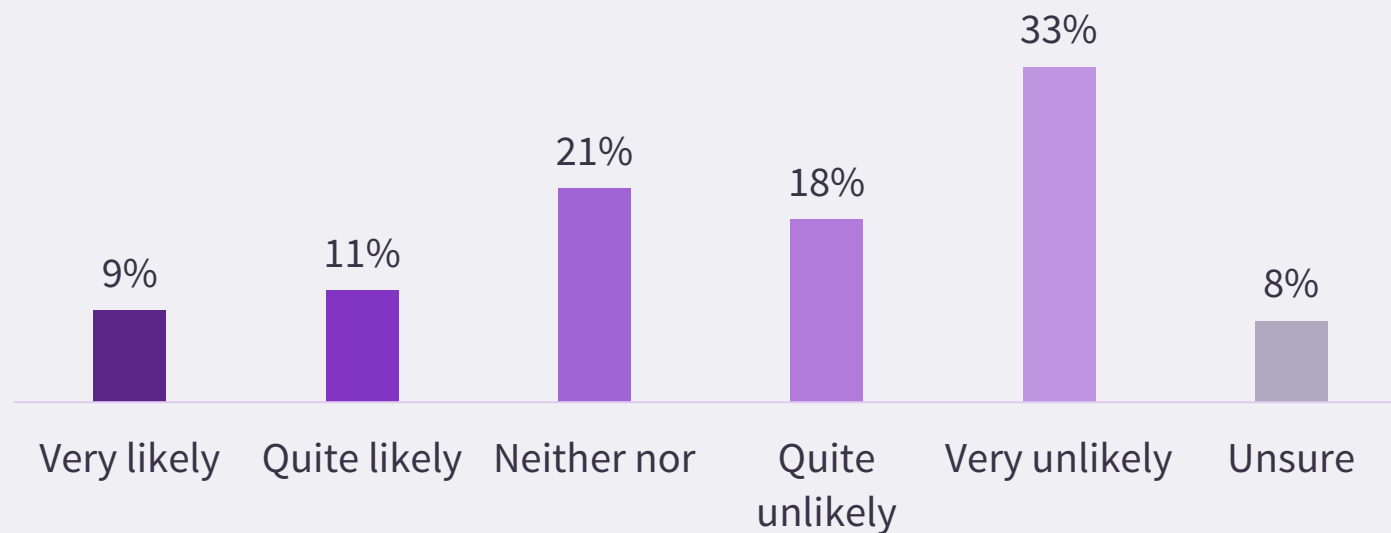
3.3 Satisfaction with electric charging points

The small minority of people who drove an electric car during their trip were generally moderately satisfied with charging infrastructure. On average, the availability and reliability of charging points in Scotland was scored just less than 7 out of 10.



3.4 Likelihood to hire an electric car if one had been available

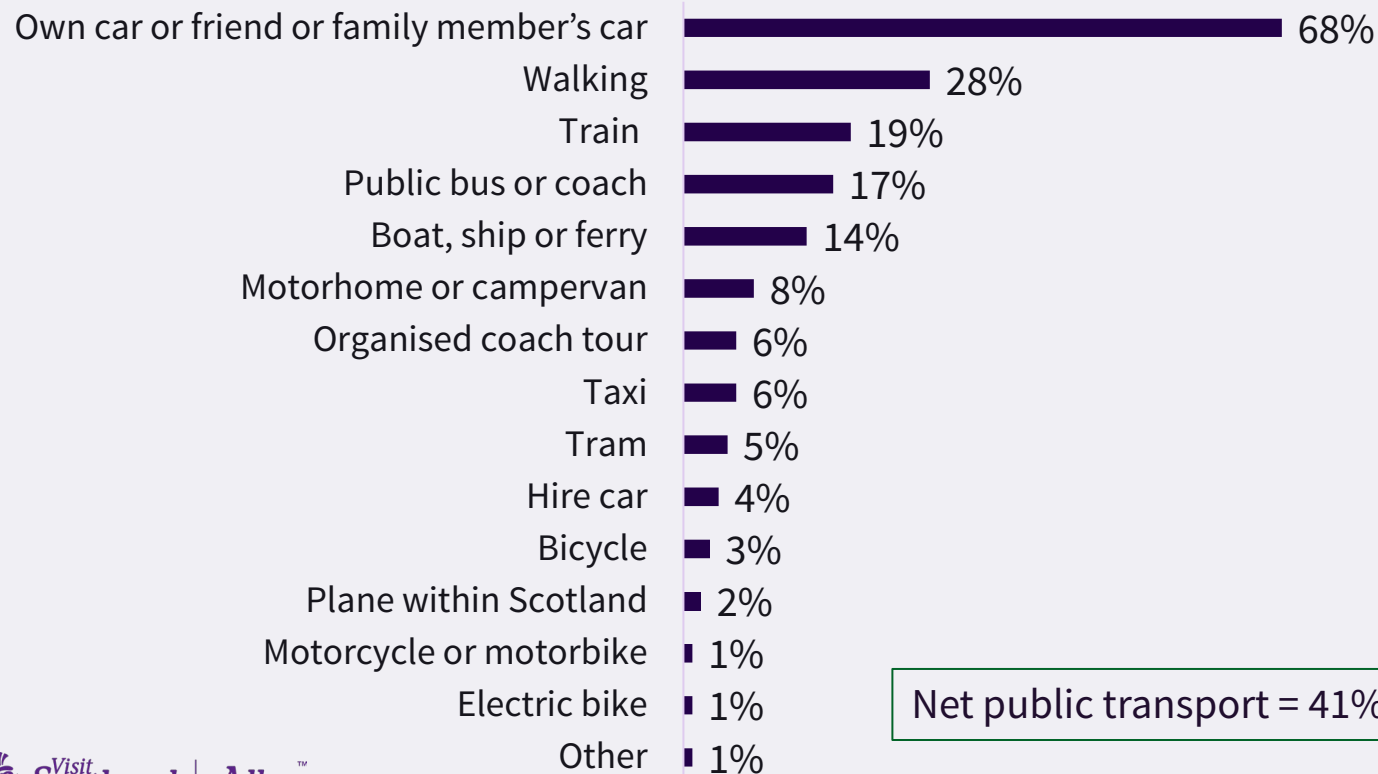
Visitors who had hired a petrol or diesel car were asked if they would have chosen an electric car, if one had been available. Only one in five (20%) said that they would have likely selected an electric car, with a third saying this would have been very unlikely.



- Findings did not vary by market (UK, Europe, long haul)
- Families were more likely to consider an electric hire car (32% likely) than other life stage groups.

3.7 Travel within Scotland: UK visitors

Almost three quarters of UK visitors travelled by car during their holiday in Scotland. For the majority, these cars were petrol or diesel, with only 3% fully electric. Two fifths used public transport, most often train, bus and/or ferry.



Net public transport = 41%

72%

of UK visitors travelled by car during their visit

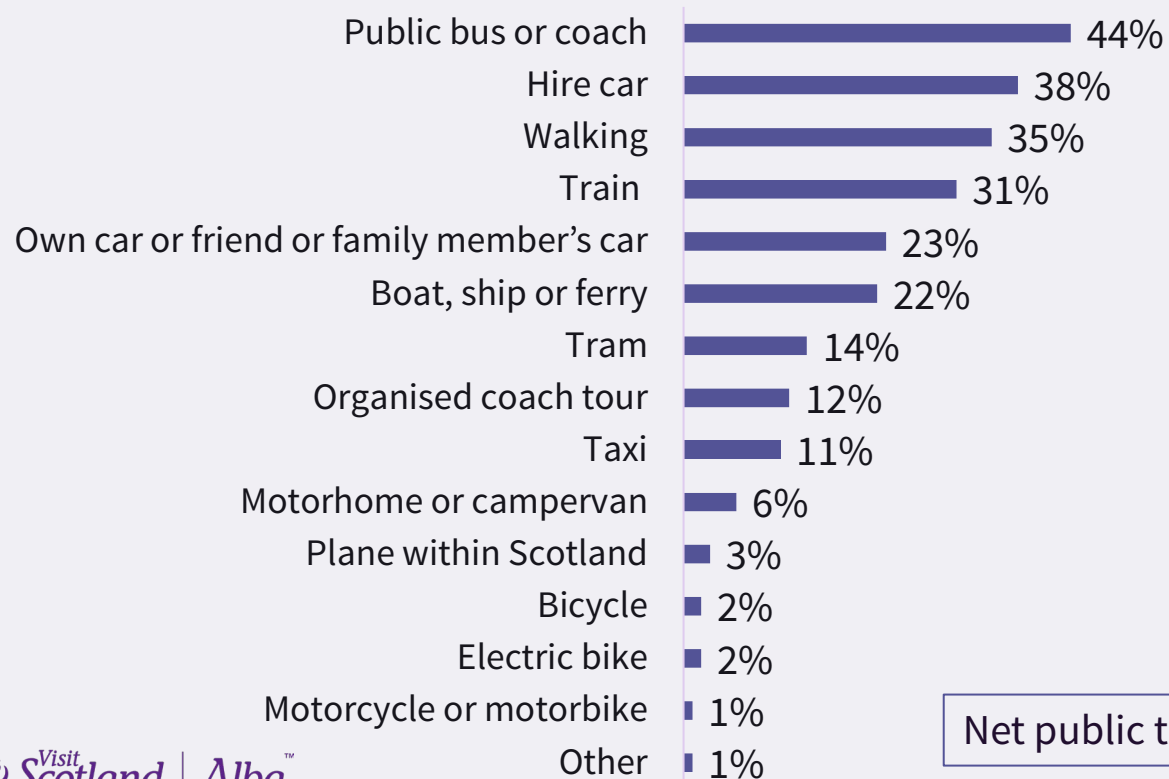
Type of car



- 86% petrol or diesel
- 11% hybrid
- 3% electric
- 1% unsure

3.8 Travel within Scotland: Europe visitors

Two thirds of Europe visitors reported that they used public transport during their visit to Scotland, most often buses. Three fifths travelled by car (most often a hire car), with only 2% of these fully electric.



Net public transport = 66%

60%

of Europe visitors travelled by car during their visit

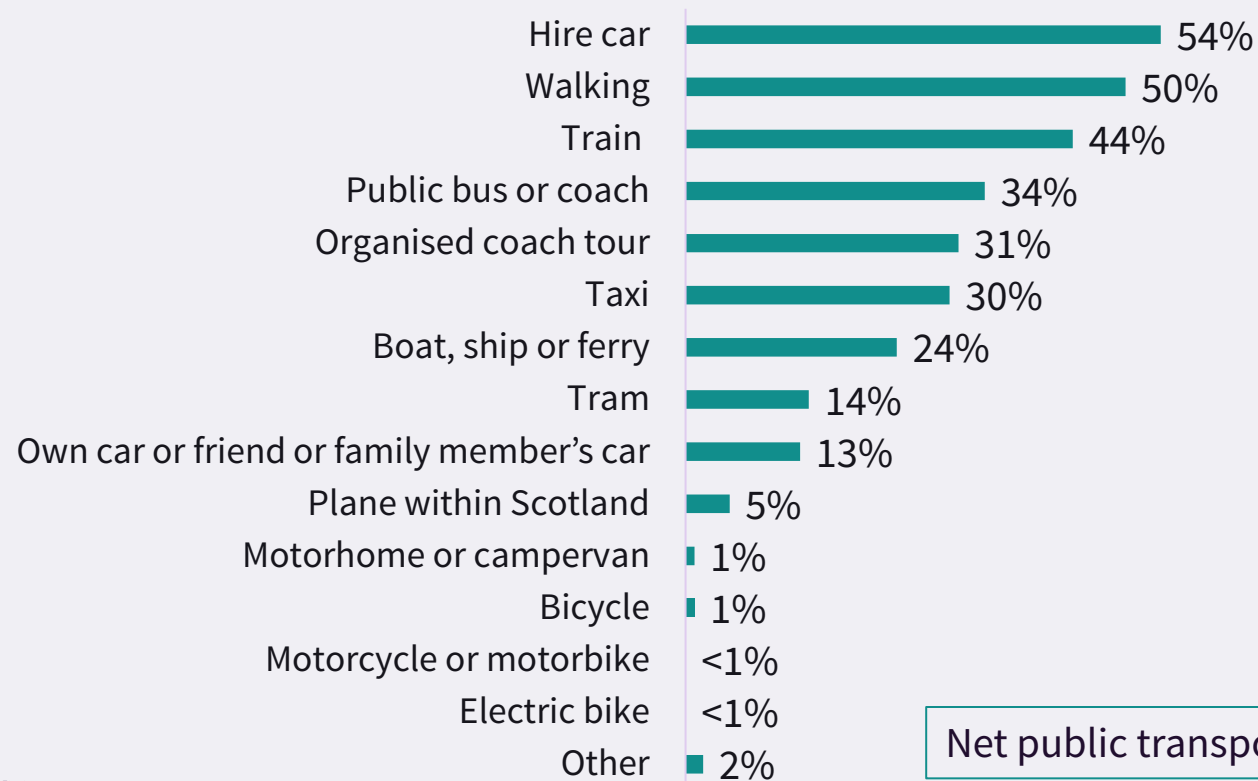
Type of car



- 82% petrol or diesel
- 14% hybrid
- 2% electric
- 1% unsure

3.9 Travel within Scotland: Long haul visitors

Two thirds of long haul visitors used public transport during their trip, most often trains. More than half hired a car, while a further 13% travelled in a friend's or family member's car. Only 2% of cars used by long haul visitors were fully electric.



Net public transport = 66%

63%

of Europe visitors travelled by car during their visit

Type of car

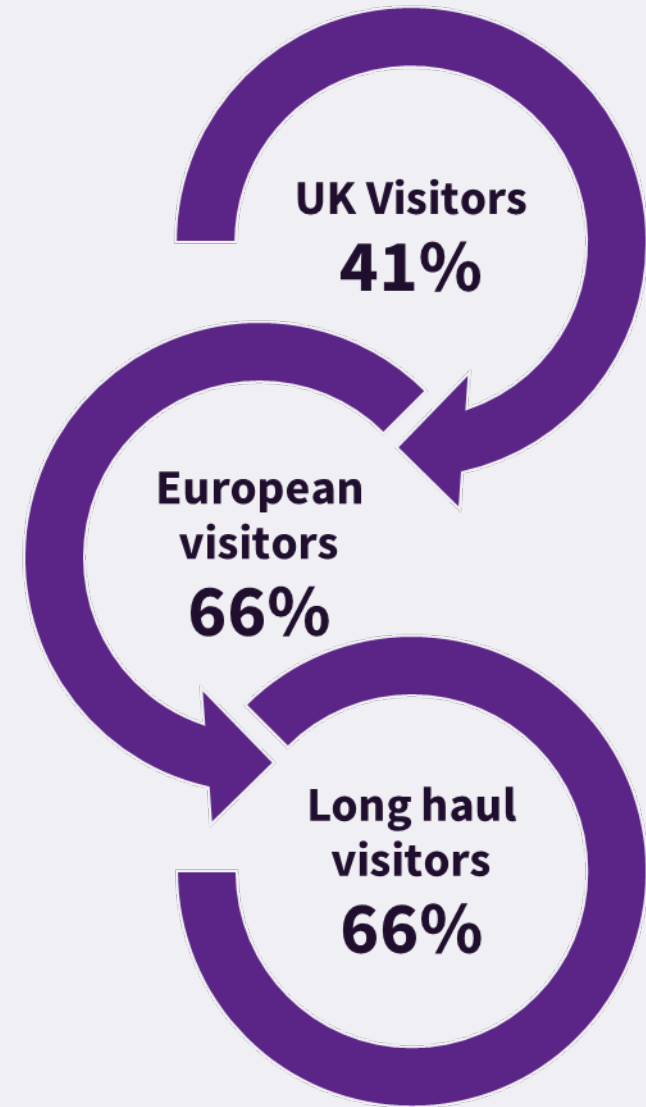


- 78% petrol or diesel
- 16% hybrid
- 2% electric
- 5% unsure

4. Use of Public Transport

In this section, we wanted to understand the proportion of visitors using public transport, reasons for and against using it and their overall satisfaction with the service they received.

49% of all visitors said they used public transport on their trip in Scotland



4.1 Public Transport: UK and Long Haul Markets



Rest of UK: 43%



Scotland: 35%



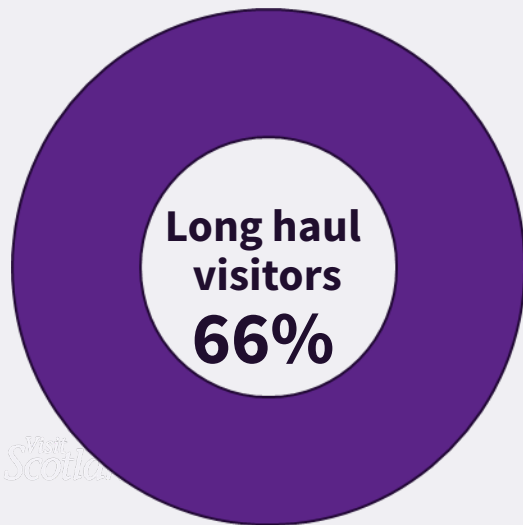
USA: 64%



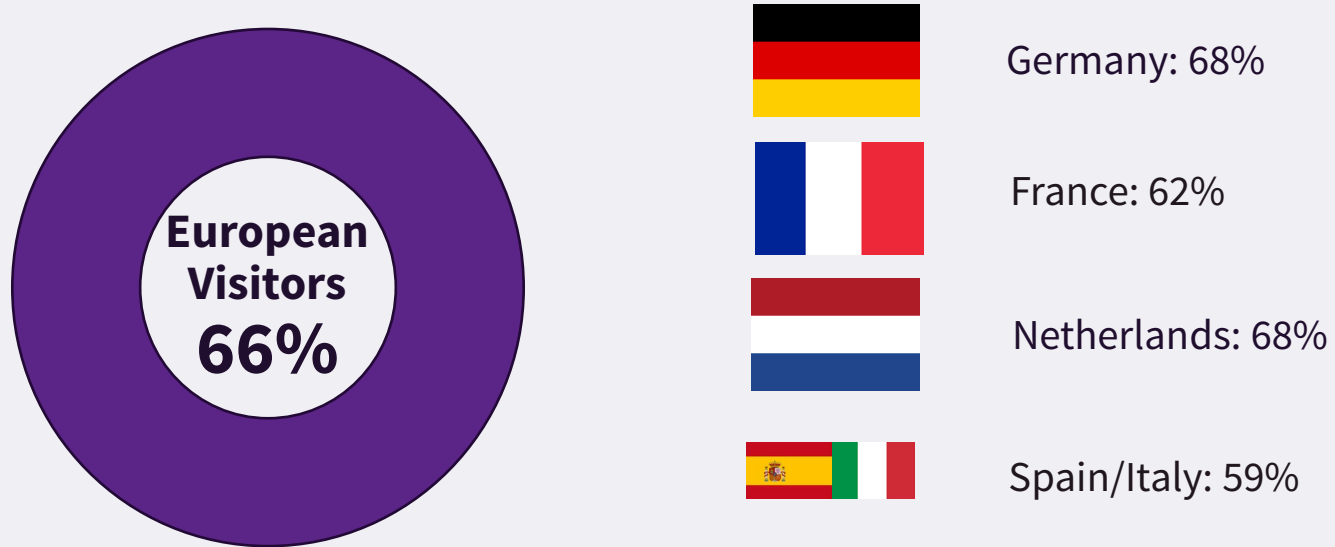
Canada: 77%



Australasia: 63%



4.2 Public Transport: European Markets



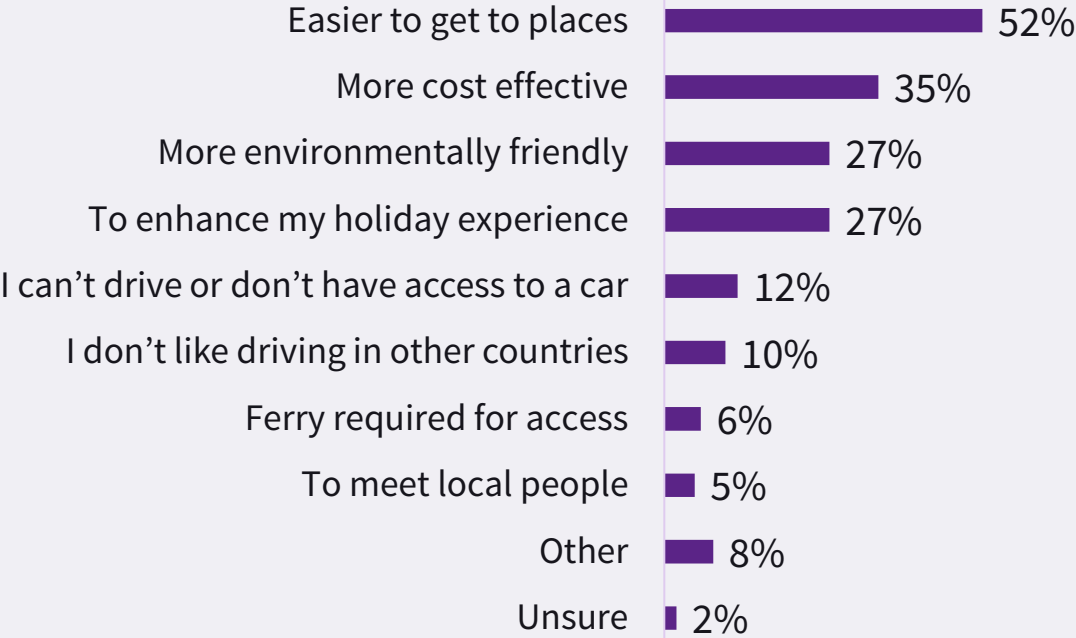
Technical note: the overall Europe figure is weighted (and can be compared to UK and long haul figures) but individual European markets are unweighted due to sample sizes



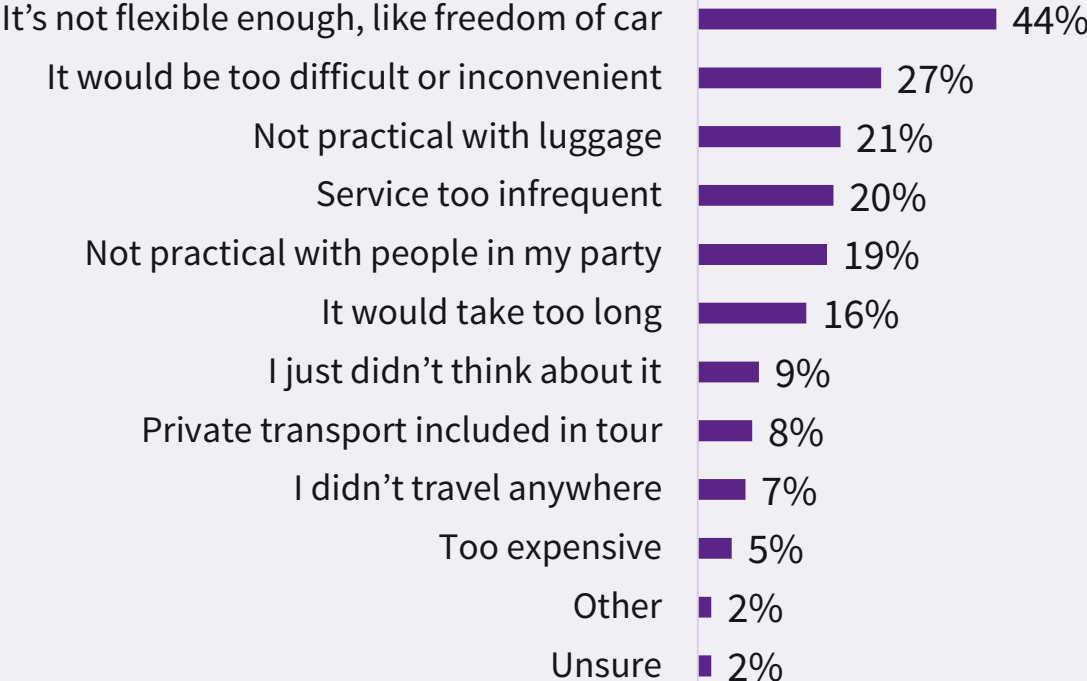
4.3 Reasons for and against choosing public transport

The key motivations for using public transport were ease of getting to the destination and cost, with over a quarter mentioning being environmental. The main barriers were flexibility, convenience and practicality concerns.

Reasons for choosing public transport



Reasons for not choosing public transport



Pre-nesters were generally more likely to be motivated by the environment (35%), cost (48%) and not having a car (27%) than other life stage groups.

Base (Q40 – All who used public transport): 1,517; Base (Q41 – all who did not use public transport): 1,485
 Q40 (Stage 2): What were your reasons for choosing to use public transport?; Q41 (Stage 2): What were your reasons for not choosing to use public transport?

Reasons for and against choosing public transport: UK visitors

For UK visitors the key motivation for using public transport was ease of getting to the destination, while over a quarter mentioning being environmental. The main barriers were flexibility, convenience and issues with practicalities.

Reasons for choosing public transport



Reasons for not choosing public transport



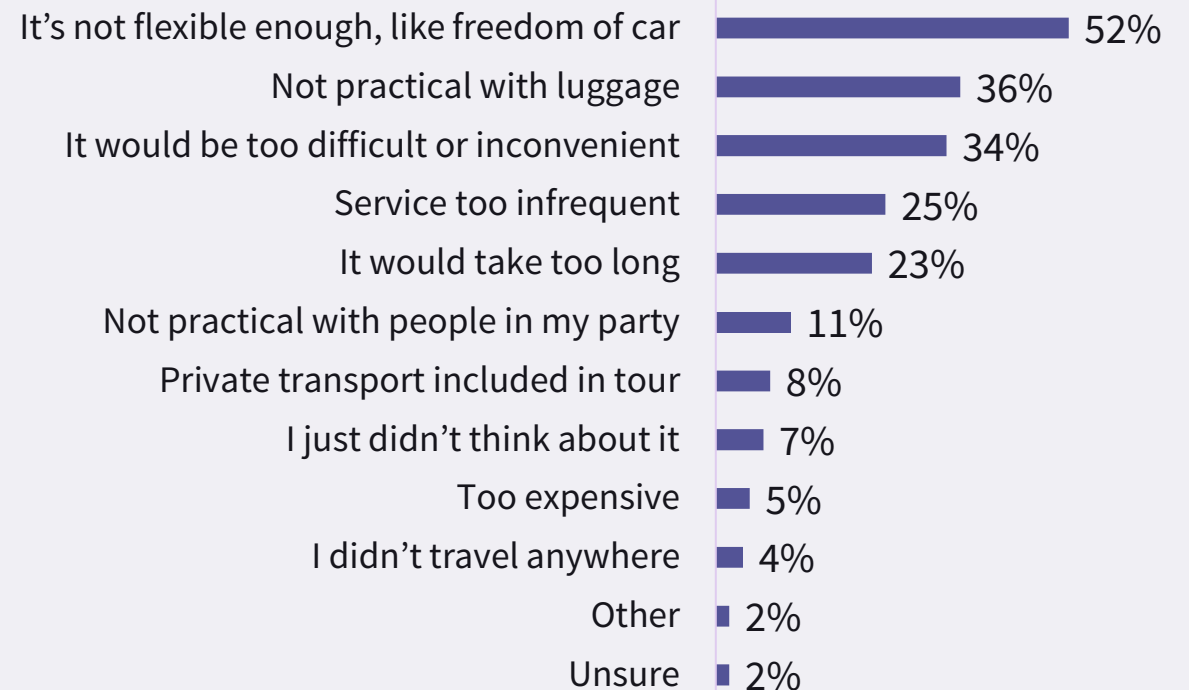
Reasons for and against choosing public transport: Europe visitors

Half of European visitors who used public transport said they did so because of ease of getting to the destination, while a third considered it cost effective and three in ten mentioned being environmental. The main barrier was the lack of flexibility.

Reasons for choosing public transport



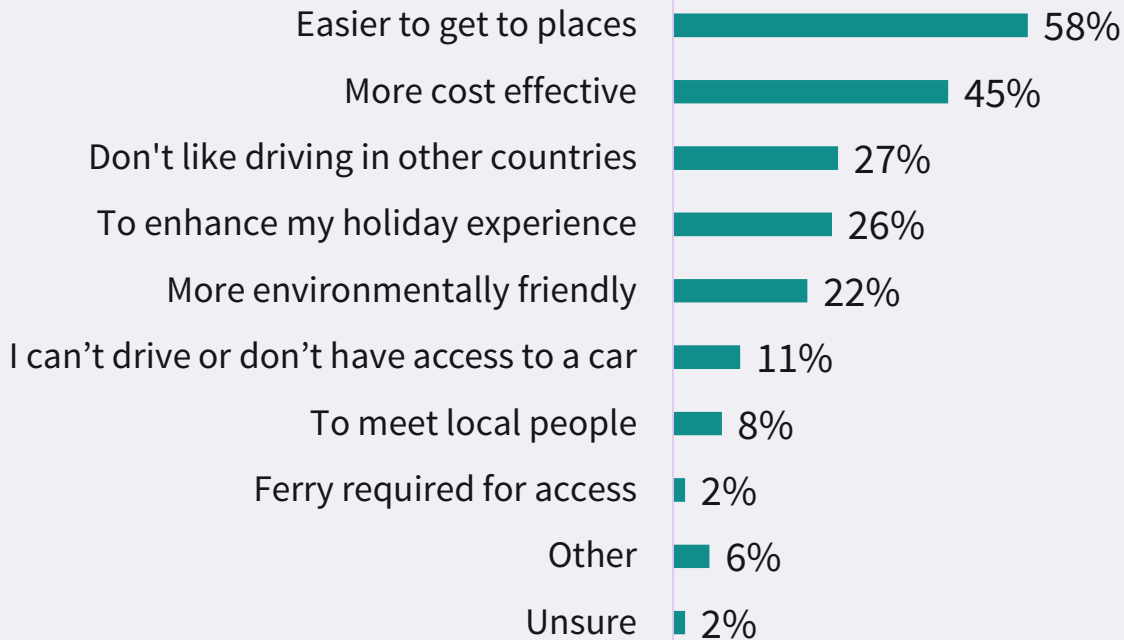
Reasons for not choosing public transport



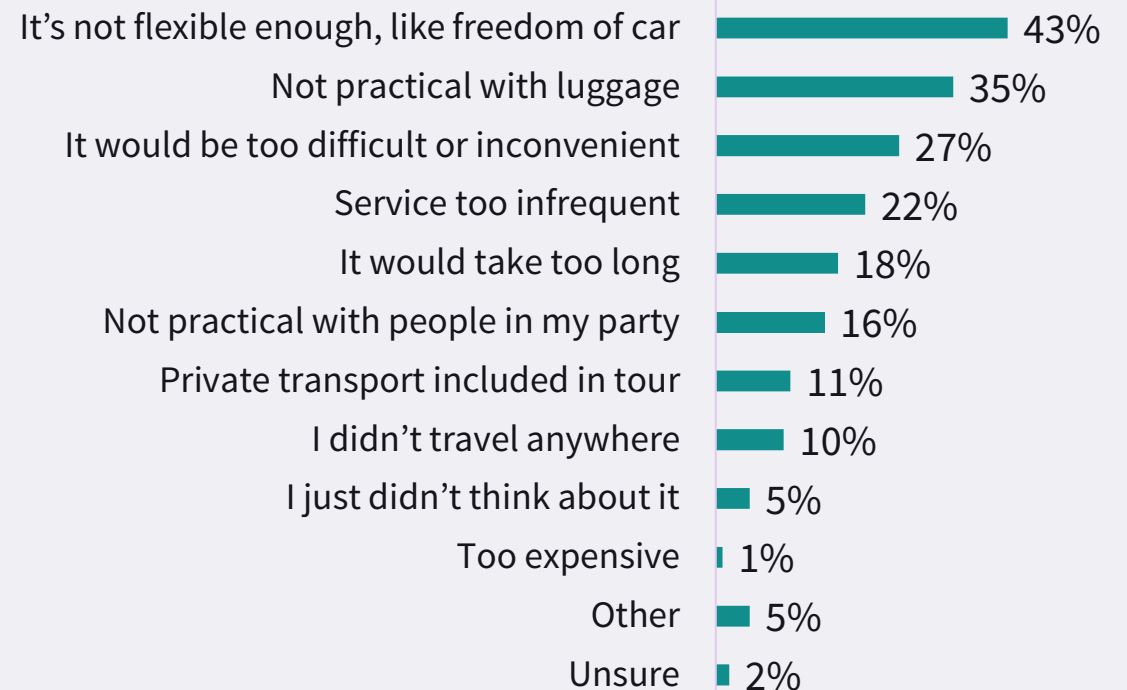
Reasons for and against choosing public transport: Long haul visitors

The key reasons for long haul visitors using public transport were the ease of getting to the destination and cost, with environmental considerations lower down the list. The main barriers were the lack of flexibility and the need to take luggage.

Reasons for choosing public transport

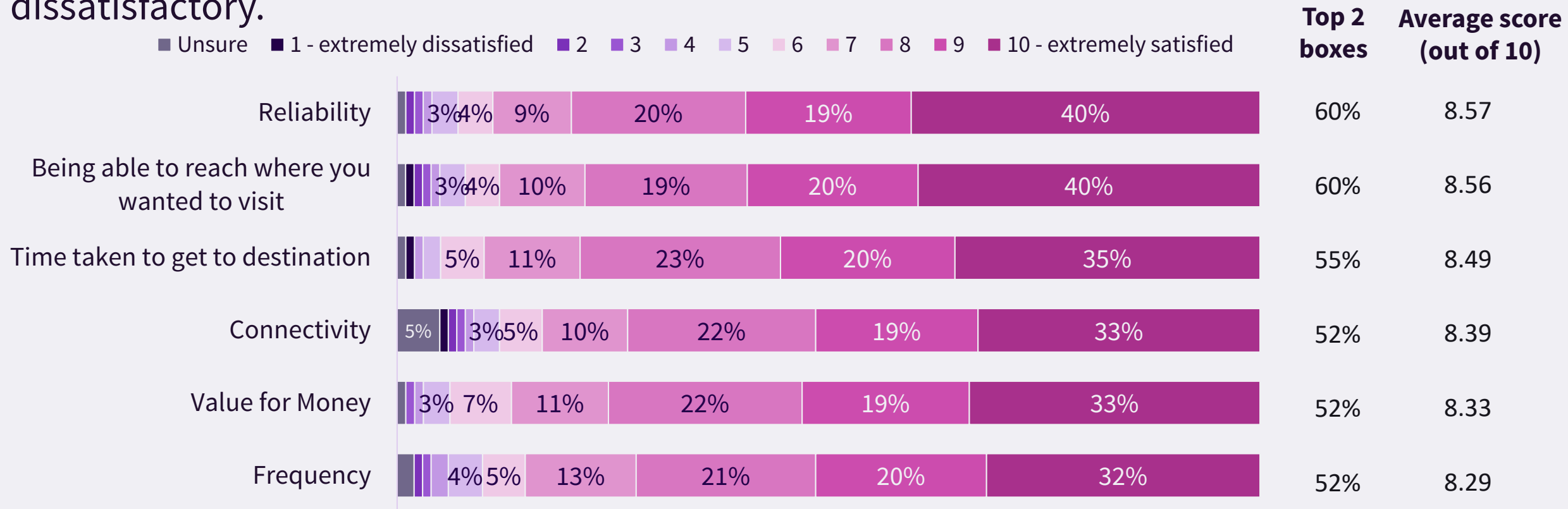


Reasons for not choosing public transport



4.4 Satisfaction with public transport

People who used public transport were generally very satisfied with their experience. In particular, the reliability of public transport and the ability to reach their destination were rated in top two boxes by the majority, while no aspects were rated as dissatisfactory.

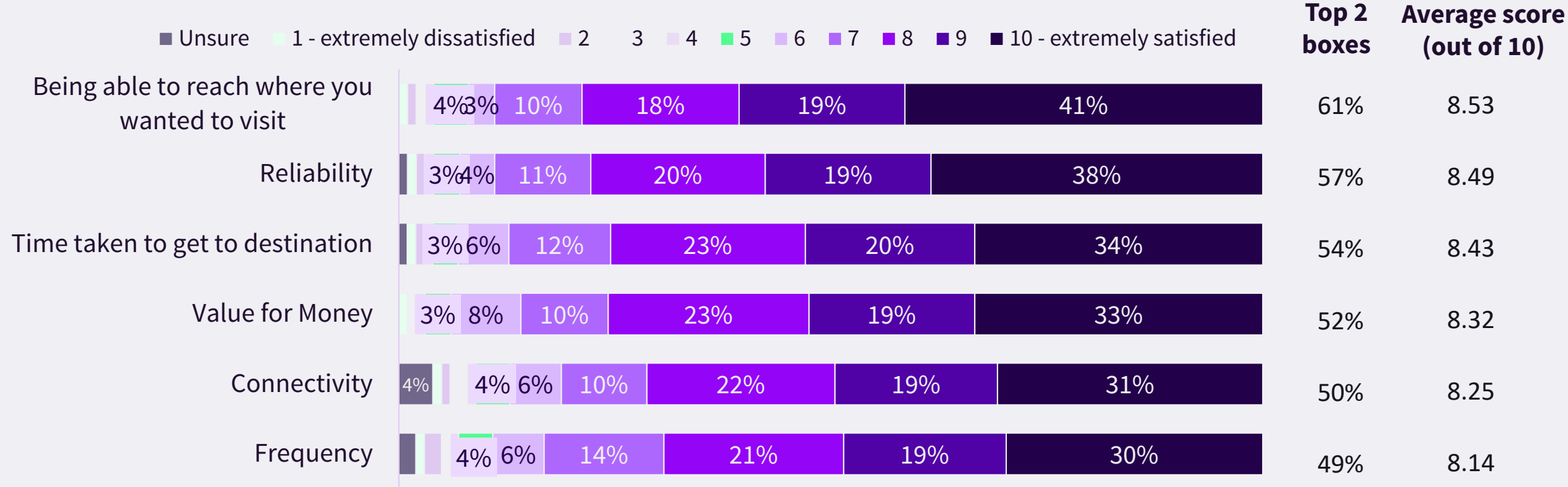


Visitors staying in rural locations were less likely to score top 2 boxes for being able to reach where you wanted to visit (54%), frequency (40%) and value (42%) than those staying in urban areas (65%, 57% and 54% respectively).

Base (all who used public transport, excl. not applicable): 1,192 – 1,470
 Q39 (Stage 2): Thinking about the public transport you used in Scotland, how would you rate it in terms of the following?

Satisfaction with public transport: UK visitors

UK visitors were generally very satisfied with public transport during their trip. In particular, the ability to reach their desired destination and reliability were rated in top two boxes by the majority, while no aspects were rated as dissatisfactory.

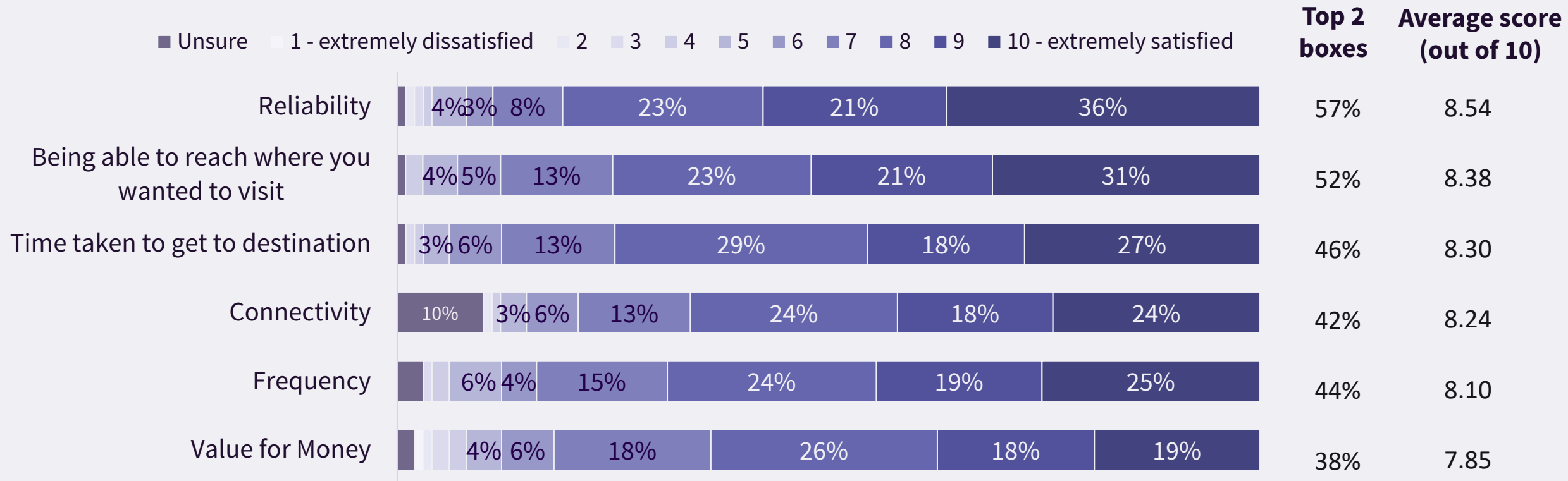


Scotland visitors were less likely to score top 2 boxes for frequency (39%) than visitors from the rest of the UK (52%).

Base (UK visitors who used public transport, excl. not applicable): 397 - 545
 Q39 (Stage 2): Thinking about the public transport you used in Scotland, how would you rate it in terms of the following?

Satisfaction with public transport: Europe visitors

Visitors from Europe were generally satisfied with public transport during their trip. Reliability and the ability to reach their destination received the highest ratings, while value for money received the lowest. Ratings provided by Europe visitors tended to be lower than for UK and long haul visitors.

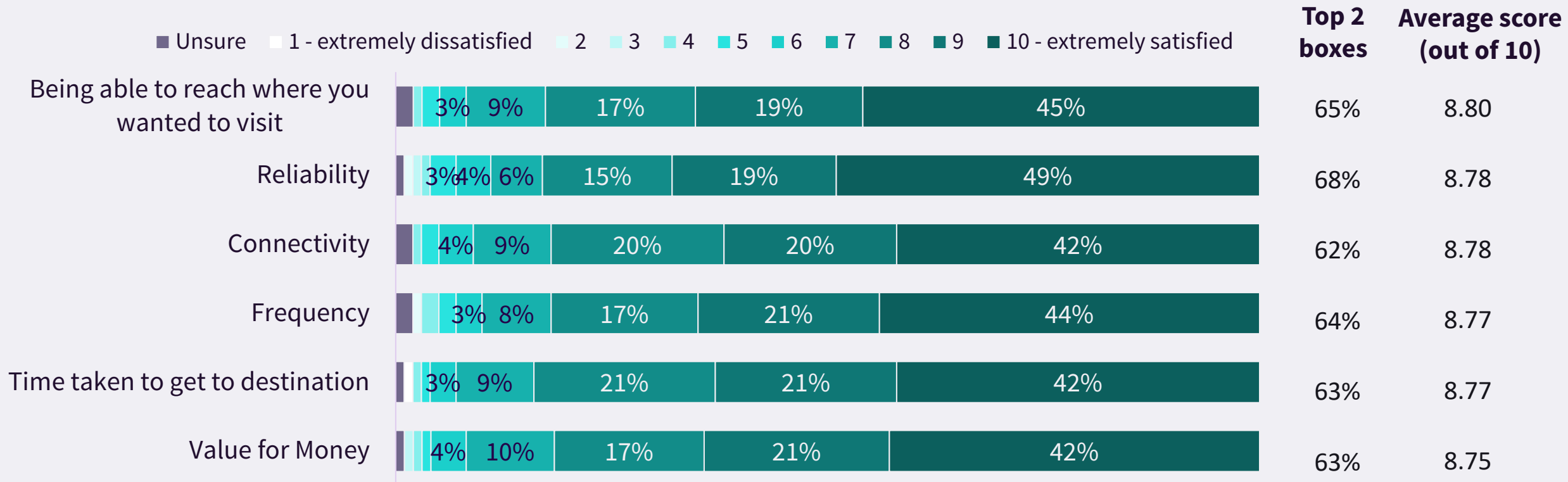


Visitors from Spain/Italy provided higher scores for being able to reach destinations, time taken and frequency, while those from Germany provided the highest score for value.

Base (Europe visitors who used public transport, excl. not applicable): 319 - 383
 Q39 (Stage 2): Thinking about the public transport you used in Scotland, how would you rate it in terms of the following?

Satisfaction with public transport: long haul visitors

Visitors from long haul destinations were particularly positive about their experiences of using public transport. The ability to reach their desired destination and reliability received the highest ratings, however, all aspects were rated by the majority as very satisfactory.

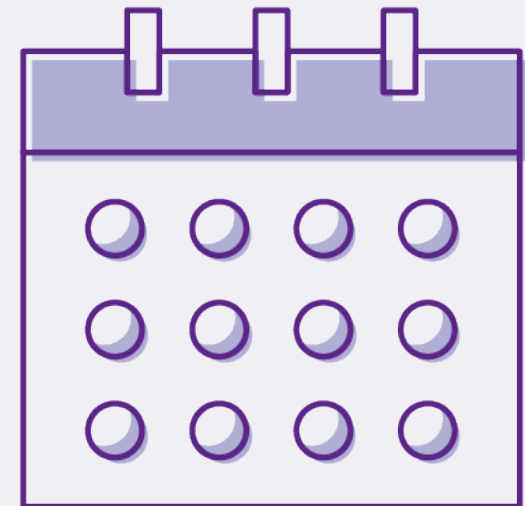


Visitors from Australasia tended to provide lower ratings than those from the USA or Canada.

Base (Long haul visitors who used public transport, excl. not applicable): 440 - 501
 Q39 (Stage 2): Thinking about the public transport you used in Scotland, how would you rate it in terms of the following?

6. Definitions used within this report

- Within this report, **the term visitor is used to refer to respondents to the survey**. Data has been weighted to reflect the profile of visitors to Scotland and its regions using the national statistical monitors (Great Britain Tourism Survey and International Passenger Survey). More detail is available within a separate Background and Methodology report.
- **Within this report the following market definitions apply**
 - UK: respondents resident in Scotland or the rest of UK
 - Europe: respondents resident in Scotland's core markets of France, Germany, Spain, Italy, Netherlands and any other European country
 - Long haul: respondents resident in USA, Canada and Australasia
- **Within this report the following life stage definitions apply**
 - Pre nesters: respondents aged 16 to 34 with no children
 - Families: respondents aged 16 to 64 with children living at home
 - Older independents: respondents aged 35 to 64 with no children
 - Retirement age: respondents aged 65 and over





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June 2024