

SCOTLAND VISITOR SURVEY 2023

MOTIVATIONS AND INSPIRATION (29 SLIDES)

1. What were the drivers for taking a holiday?
2. What were the main reasons for choosing Scotland?
3. What were the key sources of inspiration which helped visitors to decide on Scotland (includes film, TV and literature)?

April 2024

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Motivations and Inspiration

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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.



Summary: Motivations and Inspiration

What calls people to Scotland is a personal choice and can be diverse and varied.

But we have core assets which continue to resonate very strongly with our visitors.

Scotland's iconic scenery and landscape and the richness of our history and culture remain as the top motivators for choosing Scotland. We can amplify the strength of these assets by connecting people to our legends and stories which brings the history and geography together in new and surprising ways.

Scots are well known for their warmth of welcome and 'Scotland's people' continues to be a key reason for choosing Scotland. This helps create the emotional connection that visitors find here.

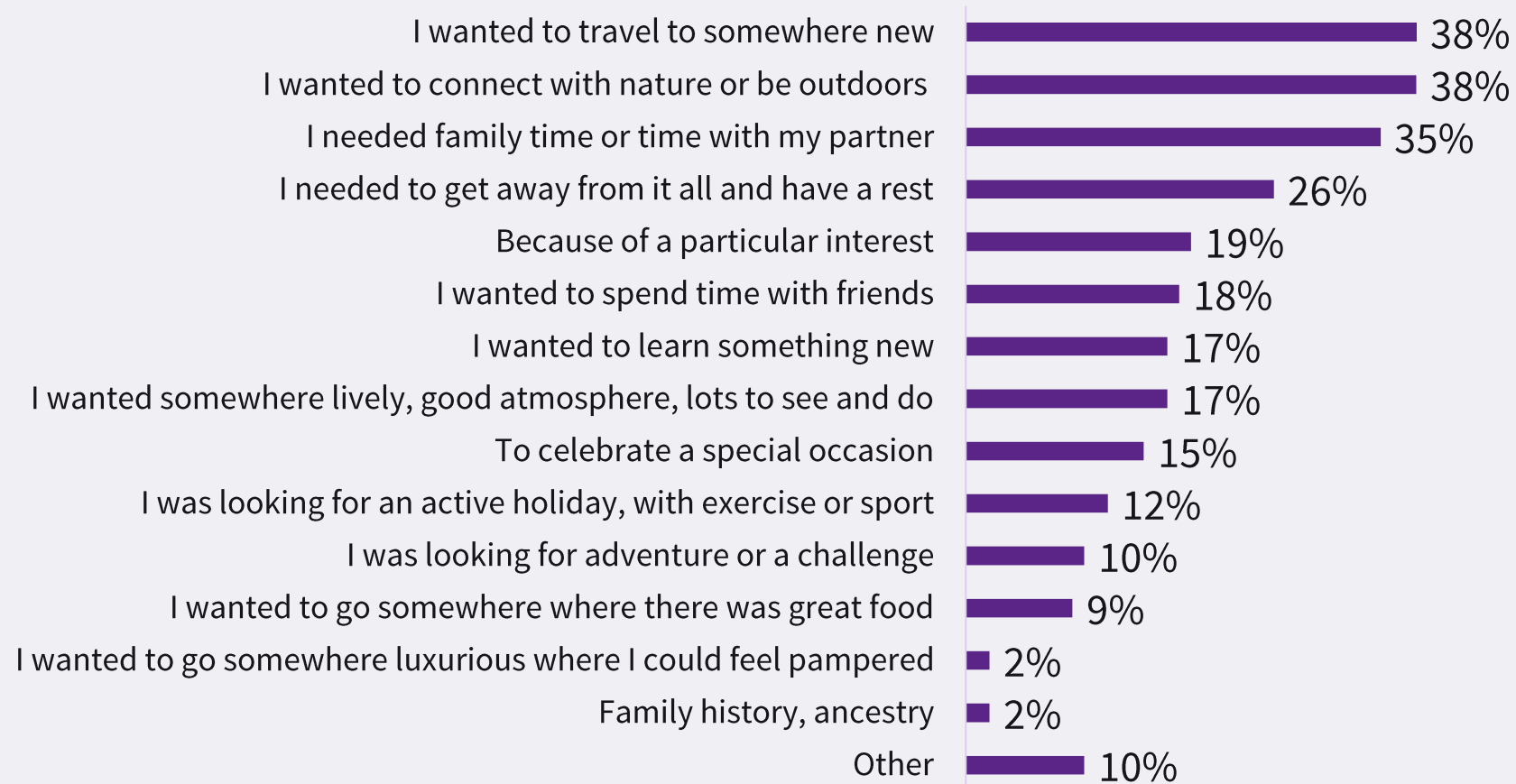
Visitors recall a diverse range of sources of inspiration. The number of sources is often linked to how much is invested in the trip. For domestic travellers, familiarity with Scotland is often higher and range of sources recalled lower than overseas visitors.

Film, TV and literature has a role in inspiring visitors, helping to showcase Scotland, particularly to our overseas markets. The number of film and TV programmes mentioned shows a breadth of influence and a longevity well beyond the release year of a film or TV programme. Local Hero and The Wickerman were mentioned by individual visitors and these films have seen their 40th and 50th release anniversaries in 2023.

1. Drivers for taking a holiday

In this section, we wanted to understand why people decided they needed a holiday in the first place.

There is no single driver to taking a holiday but a combination of many. Respondents were primarily seeking new experiences, a connection with nature or the outdoors and time with loved ones when they were considering potential holiday destinations.



Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland? Base (all): 3,011

1.1 Drivers for taking a holiday: summary

Whilst the core drivers are broadly consistent, there are market differences. **UK respondents are more likely than other markets to mention family time and getting away from it all.**

European respondents are driven by a more energetic holiday. They are more likely to mention a connection with nature and wanting a lively atmosphere. They tend to have a younger profile than long haul and UK visitors.

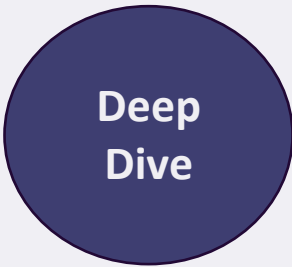
Travelling somewhere new and learning something new were more likely to be mentioned by long haul respondents. They are less likely to be looking for rest and relaxation.

Food is typically not a primary driver for taking a holiday but it has a crucial role later in the visitor journey, on arrival at the destination.

Ancestry is also not typically a primary driver for taking a holiday but it plays a greater role in choosing Scotland for some of our key markets.



1.2 Top ten drivers for taking a holiday: by market



Interpretation note for table: numbers with a * denotes a statistically significant difference

	Total sample	UK	Europe	Long haul
Travel somewhere new	38%	32%	47%	55% *
Connect with nature or outdoors	38%	37%	54% *	34%
Family/partner time	35%	37% *	31%	30%
Get away from it all	26%	29%	24%	15%
Particular interest	19%	18%	18%	26% *
Time with friends	18%	19%	14%	19%
Learn something new	17%	11%	31%	32% *
Lively, good atmosphere, lots to see and do	17%	11%	37% *	27%
Special occasion	15%	14%	11%	19% *
Active holiday	12%	11%	15%	14%
Base:	3,011	1,531	625	795

1.3 Top five drivers for taking a holiday: by life stage



Pre Nesters

- 1. Somewhere new 54%
- 2. Nature/outdoors 51%
- 3. Family time 39%
- 4. Somewhere lively 35%
- 5. Get away from it all 35%

Base: 338

Families

- 1. Family time 66%
- 2. Nature/outdoors 50%
- 3. Somewhere new 36%
- 4. Get away from it all 27%
- 5. Somewhere lively 21%

Base: 327

Older independents

- 1. Nature/outdoors 39%
- 2. Somewhere new 37%
- 3. Family time 34%
- 4. Get away from it all 29%
- 5. A particular interest 19%

Base: 1,406

Retirement age

- 1. Somewhere new 35%
- 2. Nature/outdoors 29%
- 3. Family time 22%
- 4. A particular interest 22%
- 5. Time with friends 21%

Base: 901

2. Reasons for choosing Scotland

- What calls people to Scotland is personal to the individual and may be diverse and varied.
- But we have **core assets which continue to resonate strongly with visitors from all our markets**. Scotland's scenery and landscape (70%) and our history and culture (48%) remain the core motivators cited by our visitors for choosing Scotland.
- **Whilst these core motivators have not changed, how we tell our stories and how we connect people to these assets in new and surprising ways** is Scotland's opportunity going forward.
- Visiting friends and family also drives many visitors to Scotland (22%) and Scotland's people should also be viewed as a core asset for tourism (21%)
- A specific Scottish attraction or experience can be a reason to drive visits (19%). Examples mentioned include Edinburgh Castle, Falkirk Wheel, Skara Brae and Highland Games.
- 15% highlight Scotland's food and drink as a reason for choosing Scotland which compares to 9% who 'wanted to go somewhere where there was great food' in the earlier drivers for taking a holiday (section 1).

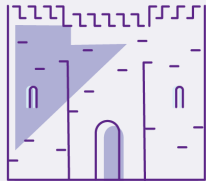


2.1 Reasons for choosing Scotland: top ten

Scotland's scenery, history and culture remain the key motivations for visits. More than one in five visitors reported their trip was to visit friends or family.



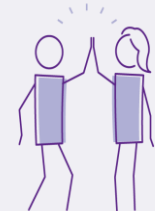
70%
scenery and landscape



48%
history and culture



27%
outdoor activities



22%
visiting friends and family



21%
Scotland's people



19%
attraction



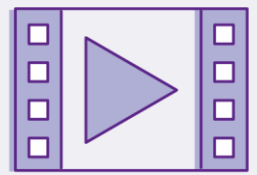
16%
ancestry



15%
close to home



15%
food & drink



9%
event or festival

2.2 Reasons for choosing Scotland: full list



2.3 Reasons for choosing Scotland

UK visitors



- The reasons for choosing Scotland will be influenced by a visitor's knowledge and familiarity with the country.
- Whilst our core assets of scenery and history are top motivators, the UK market is also driven by a range of other reasons.
- Visiting friends and family (rest of the UK visitors) and being close to home (Scotland residents) are particularly strong for the domestic market.

2.4 Reasons for choosing Scotland

European visitors

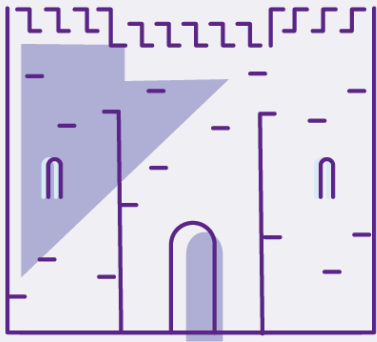


- Scotland's scenery and landscape is a very strong driver for European visitors, particularly the Northern European markets.
- Closely connected is the availability of outdoor activities which is a stronger driver for Dutch and German visitors than other markets.
- European visitors are also most likely to state Scotland's people as a reason for choosing Scotland, particularly German and Southern European visitors.
- A story or legend about Scotland, whilst a smaller driver, resonates more strongly for Europeans, particularly French and German visitors.

2.5 Reasons for choosing Scotland

Deep Dive

Long haul visitors



- Although Scotland's scenery is the top reason for choosing Scotland, our history and culture is close behind and resonates strongly for long haul markets, especially those from North America.
- Scotland's people also drives visits for our USA visitors. Ancestral ties are much more important to our Canadian visitors than other visitors, closely followed by Australasia and visitors from the USA.
- Australian visitors have strong family connections with Scotland and much more likely to state visiting friends and family as a key driver.
- Scotland's food and drink is a stronger driver for USA visitors than other markets.

2.6 Reasons for choosing Scotland: market summary



Interpretation note for table: numbers with a * denotes a statistically significant difference

	Total sample	Domestic	Overseas	Scotland	Rest of UK	Europe	Long haul
Scenery and landscape	70%	66%	78%	61%	69%	82% *	75%
History and culture	48%	40%	68%	28%	44%	65%	70% *
Outdoor activities	27%	27%	28%	26%	27%	28%	29%
Visiting friends or family	22%	24%	19%	15%	27% *	16%	21%
Scotland's people	21%	15%	34%	-	20%	38% *	32% *
A Scottish attraction	19%	19%	19%	15%	20%	15%	22%
Scottish ancestry	16%	12%	24%	5%	15%	3%	41% *
Close to home	15%	22%	-	50%	12%	-	-
Scotland's food and drink	15%	14%	17%	14%	14%	14%	19%
Particular experience	9%	9%	10%	6%	10%	7%	12% *
Base:	3,011	1,531	1,480	456	1,075	625	795

Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?

2.7 Reasons for choosing Scotland: top 3 market summary

Scotland residents

1. Scenery and landscape (61%)
2. Close to home (50%)
3. History and culture (28%)
4. Outdoor activities (26%)

Over-index on:

- Close to home (50%)
- Have a second home (6%)

Rest of UK visitors

1. Scenery and landscape (69%)
2. History and culture (44%)
3. Outdoor activities (27%) Visiting friend and family (27%)

Over-index on:

- Visiting friends and family (27%)

European visitors

1. Scenery and landscape (82%)
2. History and culture (65%)
3. Scotland's people (38%)

Over-index on:

- Scenery and landscape (82%)
- History and culture (65%)
- Scotland's people (38%)

Long haul visitors

1. Scenery and landscape (75%)
2. History and culture (70%)
3. My family's Scottish ancestry (41%)

Over-index on:

- Scenery and landscape (75%)
- History and culture (70%)
- My family's Scottish ancestry (41%)

2.8 Reasons for choosing Scotland: by life stage



Pre Nesters

Top reasons:

1. Scenery and landscape 76%
2. History and culture 56%
3. Outdoor activities 35%
4. Scotland's people 28%

Over index on:

- History and culture 56%
- Scotland's people 28%
- Outdoor activities 35%

Base: 338

Families

Top reasons:

1. Scenery and landscape 73%
2. History and culture 41%
3. Outdoor activities 33%
4. Visiting friends, family 26%

Over index on:

- Outdoor activities 33%
- Easy to get to 22%

Base: 327

Older independents

Top reasons:

1. Scenery and landscape 71%
2. History and culture 50%
3. Outdoor activities 27%
4. Scotland's people 22%

Over index on:

- Older independents did not over-index on any reason.

Base: 1,406

Retirement age

Top reasons:

1. Scenery and landscape 66%
2. History and culture 47%
3. Visiting friends, family 24%
4. Outdoor activities 23%

Over index on:

- A specific hotel 9%

Base: 901

2.9 Reasons for choosing Scotland: subgroup summary



Visitors travelling with pets (i.e dogs)

Top reasons:

1. Scenery and landscape 81%
2. History and culture 42%
3. Outdoor activities 36%
4. Easy to get to 27%

Over index on:

- Scenery and landscape 81%
- Outdoor activities 36%
- Easy to get to 27%

Base: 275

Visitors on a trip of a lifetime

Top reasons:

1. Scenery and landscape 80%
2. History and culture 70%
3. Outdoor activities 24%
4. Scotland's people 36%
5. Ancestry 29%

Over index on:

- Scenery and landscape 80%
- History and culture 70%
- Scotland's people 36%
- Ancestry 29%
- A Scottish attraction 26%
- Story or legend 11%

Base: 309

Urban visitors

Top reasons:

1. Scenery and landscape 50%
2. History and culture 42%
3. Visiting friends, relatives 28%
4. A Scottish attraction 20%

Over index on:

- Visiting friends, relatives 28%

Base: 480

Rural visitors

Top reasons:

1. Scenery and landscape 72%
2. History and culture 38%
3. Outdoor activities 31%
4. Easy to get to 24%

Over index on:

- Outdoor activities 31%

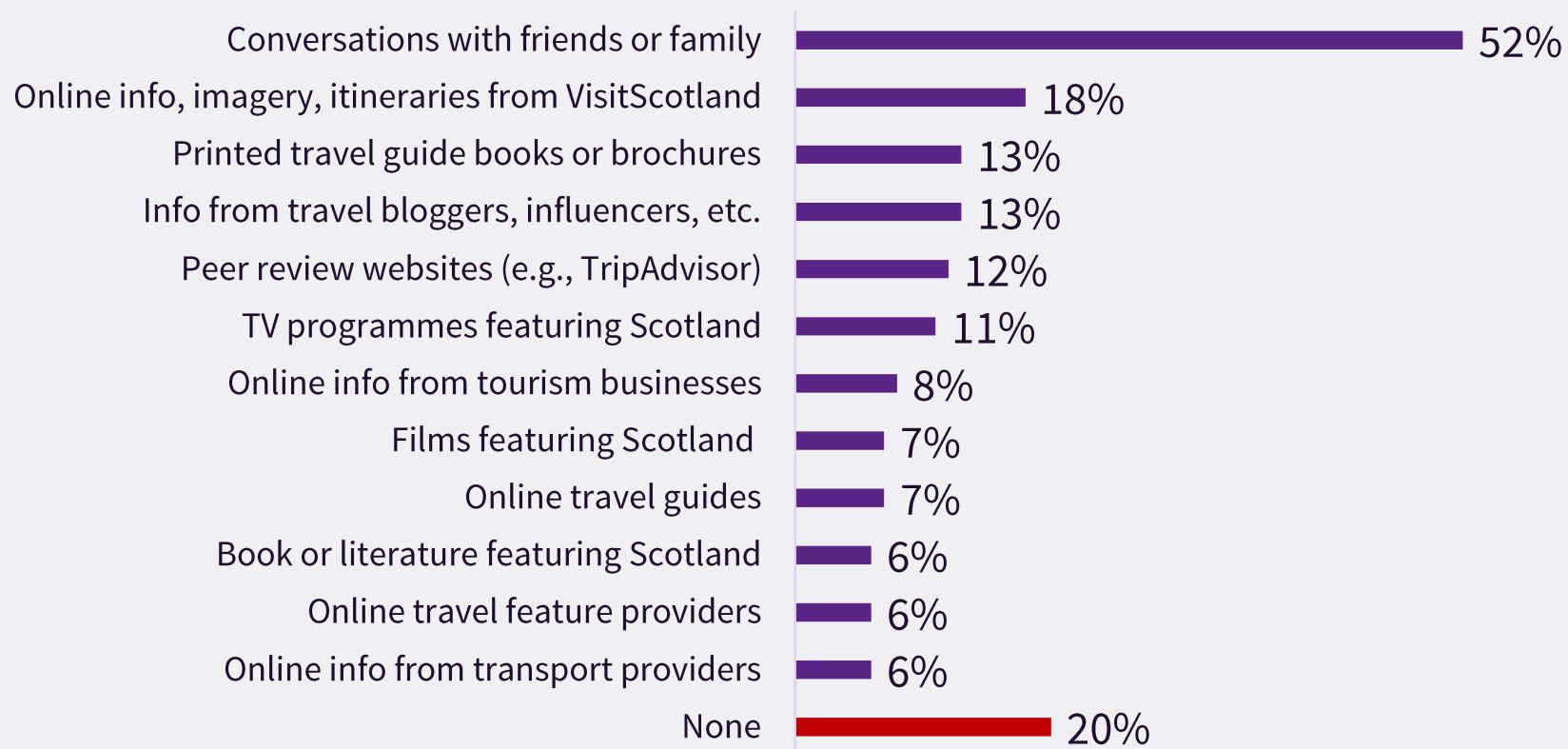
Base: 438

3. Sources of inspiration when deciding on Scotland

In this section we wanted to investigate four key categories of inspiration including:

1. Personal recommendations
2. Digital sources
3. Film, TV and literature featuring Scotland
4. Printed information

Personal recommendations was the most influential source of inspiration. Just less than one in five visitors mentioned VisitScotland online content. Film, TV or literature was also a source of inspiration to one in five visitors (net figure).



Q8 (Stage 2): Thinking back to the moment when you were considering your destination for this holiday or short break, which, if any, of these sources of inspiration helped you decide on Scotland?

Base (all): 3,011

3.1 Sources of inspiration: summary

The average number of sources of inspiration recalled is higher for overseas visitors. This may be linked to how much is invested in the trip and some having less familiarity with Scotland.

Print information is still in the mix as a source of inspiration (13%). European visitors are more likely to cite brochures and guidebooks (24%) than UK visitors (8%).

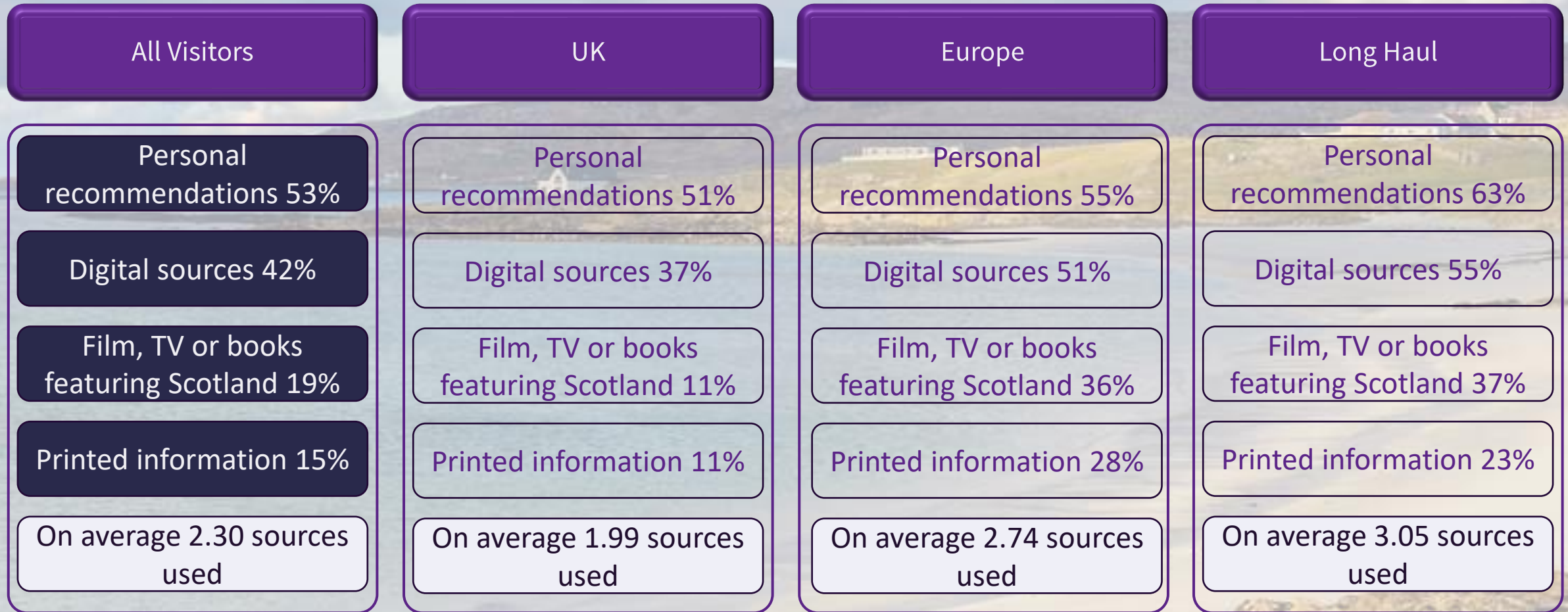
Film, TV or books featuring Scotland have a particular strong influence on our European (36%) and long haul visitors (Australasia, USA and Canada) (37%).

Film and TV programmes have a lasting influence as a source of inspiration, which often goes well beyond the 'release year' or premier. Often the TV and films mentioned are closely linked to our core assets with those showcasing Scotland's scenery and historical dramas dominating.

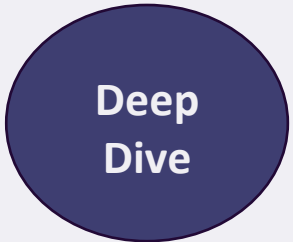


3.2 Sources of Inspiration when deciding on Scotland: net figures

A more detailed breakdown of the individual sources is available on the next slide



3.3 Sources of inspiration when deciding on Scotland: breakdown



Personal Recommendations	All Visitors	UK	Europe	Long haul
Conversations with friends and family	52%	50%	53%	59%
Advice from personal travel advisor or consultants	3%	2%	3%	8%

TV, film or books	All Visitors	UK	Europe	Long haul
Films featuring Scotland	7%	4%	19%	14%
TV featuring Scotland	11%	7%	18%	22%
Book or literature featuring Scotland	6%	3%	11%	15%

Printed information	All Visitors	UK	Europe	Long haul
Newspapers or magazines	5%	4%	9%	3%
Printed travel guide books or brochures	13%	8%	24%	22%

3.4 Sources of Inspiration when deciding on Scotland: breakdown

Deep Dive

Digital sources	All Visitors	UK	Europe	Long haul
Online travel feature providers	6%	4%	6%	12%
Online travel guides	7%	4%	8%	15%
Peer review websites	12%	11%	16%	14%
Information from travel bloggers and influencers	13%	9%	24%	23%
Online travel agent	6%	5%	6%	6%
Online information from tour operators	3%	2%	4%	11%
Travel or price comparison providers	2%	2%	3%	4%
Online information, imagery or itineraries from VisitScotland	18%	16%	20%	23%
Online information from transport providers	6%	5%	6%	10%
Online information from tourism businesses	7%	7%	7%	9%
Bargain deals on airfares, accommodation or tours	4%	4%	3%	4%

Interpretation note: Long haul refers to USA, Canada and Australasia

3.5 Sources of Inspiration when deciding on Scotland: life stage



Pre Nesters

1. Recommendations 71%
2. Digital sources 56%
3. Film, TV, literature 26%
4. Printed information 18%

Over index on:

- Conversations with family and friends 71%
- Info from travel bloggers, influencers 34%
- Peer review websites 22%
- Films 12%
- Online travel features 12%

Base: 338

Families

1. Recommendations 64%
2. Digital sources 45%
3. Film, TV, literature 18%
4. Printed information 11%

Over index on:

- Conversations with family and friends 63%
- Peer review websites 19%
- Films 11%
- Online travel features 7%

Base: 327

Older independents

1. Recommendations 54%
2. Digital sources 42%
3. Film, TV, literature 20%
4. Printed information 16%

Over index on:

- Older independents did not over-index on any source.

Base: 1,406

Retirement age

1. Recommendations 45%
2. Digital sources 37%
3. Film, TV, literature 16%
4. Printed information 16%

Over index on:

- Retirement aged visitors did not over-index on any source.

Base: 901

3.6 Sources of inspiration to choose Scotland: TV programmes

Just over one in ten of all visitors (11%) reported being inspired by a TV programme featuring Scotland, rising to 22% for long haul visitors.

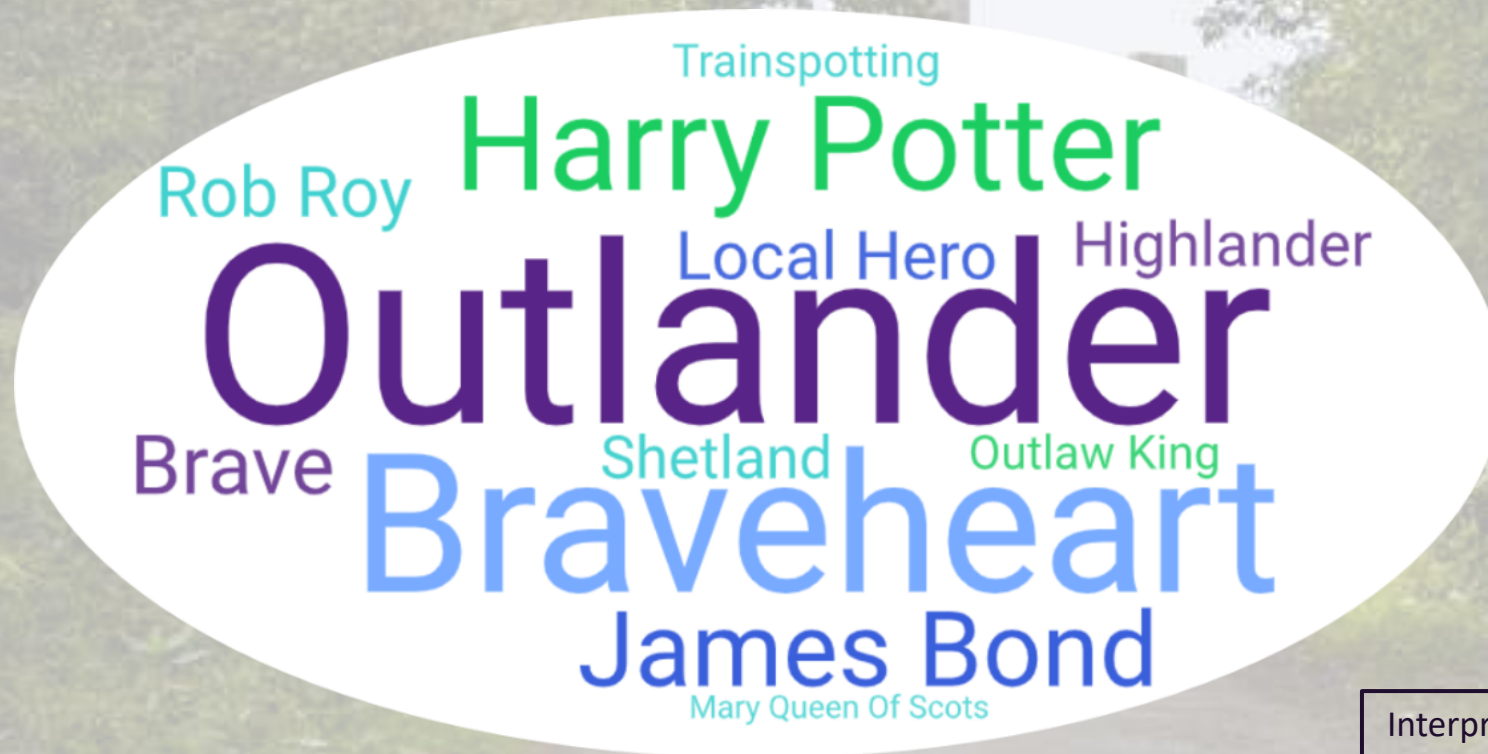


Including:	Responses
Outlander	175
Shetland	63
Men in Kilts	11
A train journey show	11
Rick Steves	9
Grand Tour series (Paul Murton)	9
Hamish MacBeth	8
Susan Calman	6
Hairy Bikers	5
Reign	3
Neil Oliver	3
Escape to the Country	3
Monarch of the Glen	3

3.7 Sources of inspiration to choose Scotland: films

Films were mentioned by 7% of all visitors as being inspirational to their visit to Scotland, rising to 19% for European visitors . Over 30 different films were cited showing a breadth of film influencing visitors and also a longevity beyond the release year of a film.

Outlander, Braveheart and Harry Potter were the most likely to be cited.



Including:	Responses
Outlander	58
Braveheart	56
Harry Potter	45
James Bond	18
Highlander	18
Local Hero	11
Rob Roy	8
Shetland	6
Outlaw King	6
Brave	4
Trainspotting	4
Mary Queen of Scots	4

Interpretation note: Outlander is a TV series but the above table reflects how respondents classified the programme, some referring to Outlander or Shetland as a film

3.8 Sources of inspiration to choose Scotland: books and literature

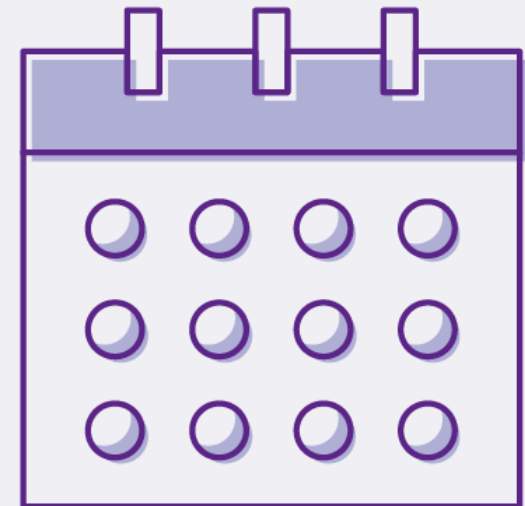
Books were cited by 6% of all visitors (rising to 15% for long haul visitors) as something that inspired their visit to Scotland. Those most likely to be mentioned were Outlander, history books, travel guides and Harry Potter. Over 20 different books or authors were cited, again showing a breadth of influence.

Harry Potter
Travel Guide Book About Hill Walking
William Shakespeare
Outlander
History Books
Ann Cleeves Books Alexander McCall Smith
Peter May

Including:	Responses
Outlander	57
History Books	27
Travel guide	15
Harry Potter	13
Peter May	6
Alexander McCall Smith	5
William Shakespeare	5
Ann Cleeve's books	4
Book about hill walking	4

4. 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 in the travel party
 - Older independents: respondents aged 35 to 64 with no children
 - Retirement age: respondents aged 65 and over





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Contact Us:

Insight Department

visitscotland.org

visitscotland.com

research@visitscotland.com

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