

SCOTLAND VISITOR SURVEY 2023

UNDERSTANDING THE VISITOR JOURNEY EUROPEAN VISITORS (33 SLIDES)

1. When did visitors start to plan their trip to Scotland?
2. What sources of information did they use?
3. When did visitors start to book their trip to Scotland?
4. How did visitors book their accommodation, travel, activities and experiences?

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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 its regions.



Analysis by markets

This report has three sections which are based on market groupings. We know that the origin of visitors can influence their planning and booking behaviour, so analysis has been based on these market groupings, rather than a total sample level.

UK



Scotland



England



Wales



Northern
Ireland

Europe



Germany



France



Spain



Netherlands



Italy

Other Europe

Long haul



USA



Canada



Australia



New Zealand

Based on respondents' country of residence.

Interpretation Note: data weighted to reflect GBTS/IPS proportions on international vs domestic visitors

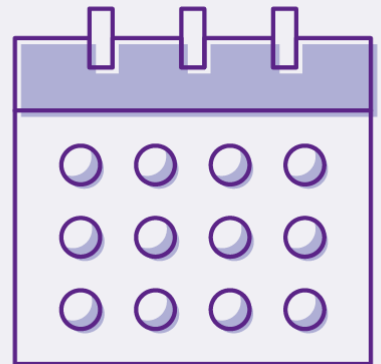
Definitions used within this report

Within this report where we explore aspects of planning and booking, we refer to the use of “travel intermediaries”.

Travel intermediaries refer to a range of types of organisations that resell tourism products onto end consumers. They may sell individual products (such as hotels, travel or activities) or they may sell packaged products which include all or some of these elements.

Broadly travel intermediaries include travel agents, tour operators, online marketplaces and price comparison websites.

More detail on the definitions used within this report is contained at the end of this report.



UNDERSTANDING THE VISITOR JOURNEY OVERVIEW



Overview(1)



- **The journey from an initial holiday idea to actually taking a holiday or short break can be complex.** It often involves many sources of information, processes, consultations and decision making along the way. **This process is not always linear.**
- **Documenting the planning and booking process for visitors to Scotland is challenging** due to the reliance on visitor's memory and perceptions of how they planned and booked their trip. The rise of the digital world has further contributed to **information overload**, making it difficult for consumers to recall the exact sources that initially inspired their holiday ideas or the channels they used.
- **Many other decision-making factors also come into play too.** For example, planning and booking will be influenced by the reason for the trip or who is on the trip: is it a short break with a loved one, or a trip of a lifetime? Does it involve travelling by themselves or planning and organising a trip for a large group of friends?
- **We know that big trips with varied itineraries have special status and are much more likely to involve the use of a travel intermediary.** These trips also have the longest planning and booking timeframes and involve the greatest number of sources.

Overview (2)



- **Visitors claim to use a wide variety of sources for planning and booking.** It is clear that many different channels may be used for booking individual elements of the same trip and this should be borne in mind when considering the results in this report.
- **For those further afield (in particular the long haul markets), the use of travel intermediaries is very strong given the greater investment and possible lesser knowledge about Scotland as a destination.** Intermediaries may be used for planning but ultimately the consumer may or may not use that knowledge to book direct themselves. European visitors and to a lesser extent UK visitors also mentioned the use of intermediaries.
- **VisitScotland resources are used by many respondents with a particularly strong role at the planning and research part of the journey.** In particular for where to go (which regions) and what to see and do on their trip (activities and experiences) in Scotland. We have seen before in the motivations and inspirations report that inspiring prospective visitors with the use of influencers, social media as well as film, tv and books are also important areas of promoting Scotland that involve the work of VisitScotland. [Browse the motivations report on visitscotland.org](https://www.visitscotland.org)



UNDERSTANDING THE VISITOR JOURNEY EUROPEAN VISITORS

Key insights: European Visitors Planning (1)

70% of European visitors started researching and planning within 6 months of travelling, with the largest proportion doing so 3 to 6 months in advance.

European visitors on the trip of a lifetime had a longer lead in time (average 34.4 weeks) than other visitors.

Those visiting family and friends tended to plan trips more spontaneously with 59% of them planning within 2 months prior to arrival.

On average European visitors started to research and plan 24.9 weeks in advance.



Key insights: European Visitors Planning (2)

85% of European visitors did look for information to help plan their trip in advance.

On average of 2.5 sources were used. VisitScotland resources were mostly mentioned, together with travel intermediaries.

Visitors aged 16-34 years old were the most likely age group to use price comparison websites (22%).



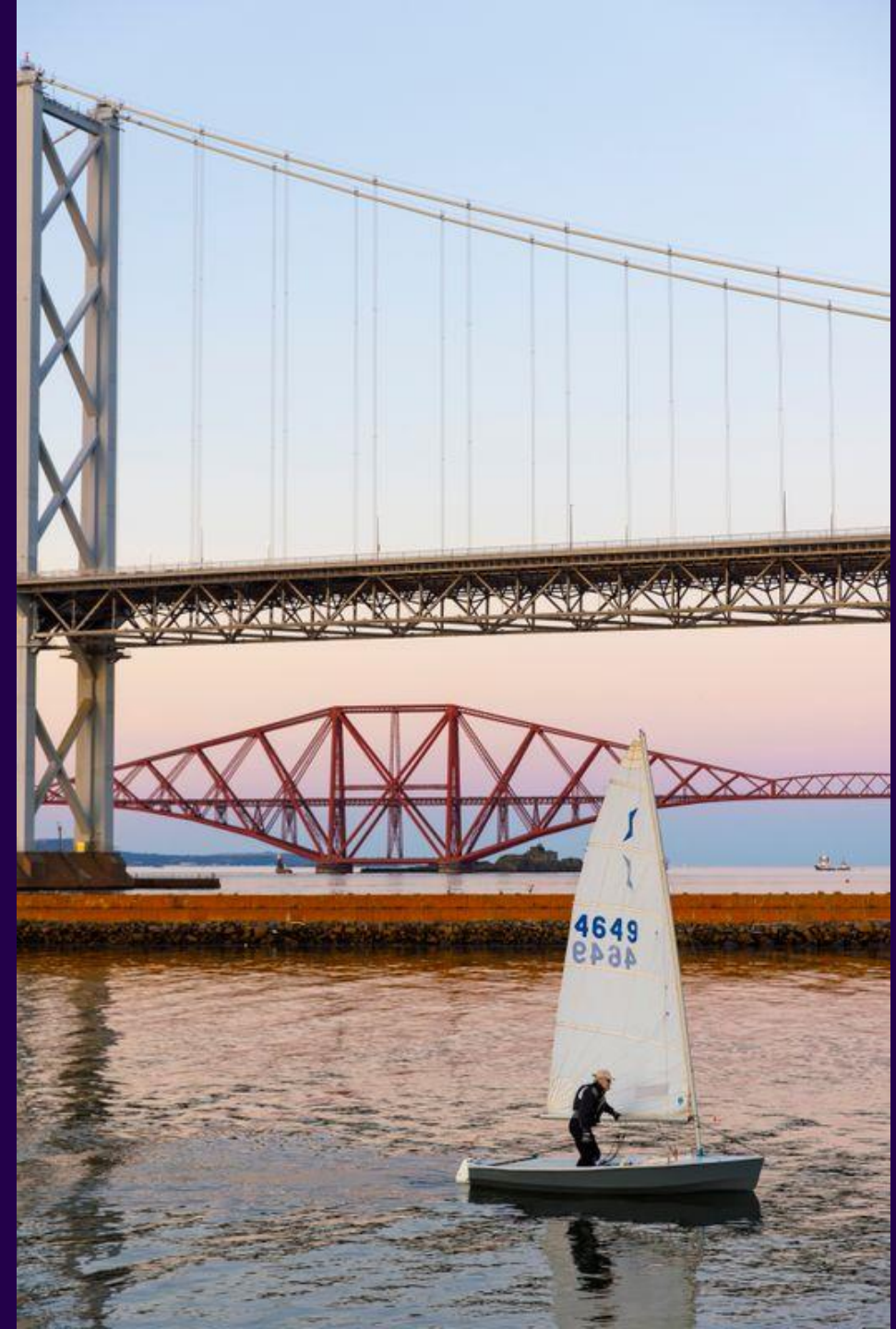
Key insights: European Visitors (Booking)

79% of European visitors reported that they booked their trip within 6 months of travel.

9% did not book in advance of their trip

Amongst those who booked in advance, the average time for booking was 15.5 weeks before travel.

On average, European visitors started planning their trip 24.9 weeks in advance and booked 15.5 weeks in advance of travel : a 9.4-week gap.



Key insights: European Visitors (Booking elements)

Accommodation

39% booked directly with providers.

68% used a type of intermediary for accommodation booking.

Transport to Scotland

67% booked directly with a transport provider.

Activities & experiences

44% booked their activities and experiences in advance of their trip. Amongst those who booked in advance, the vast majority did so directly with the activity or experience providers.



UNDERSTANDING THE VISITOR JOURNEY EUROPEAN VISITORS

Detail

1. When did European visitors start to plan their trip to Scotland?

70%

of European visitors started researching and planning their trip in Scotland within 6 months of travelling, with 42% doing so 3 to 6 months in advance.

On average:

24.9 weeks

European visitors started planning their trip 24.9 weeks in advance of travel

17.5 weeks

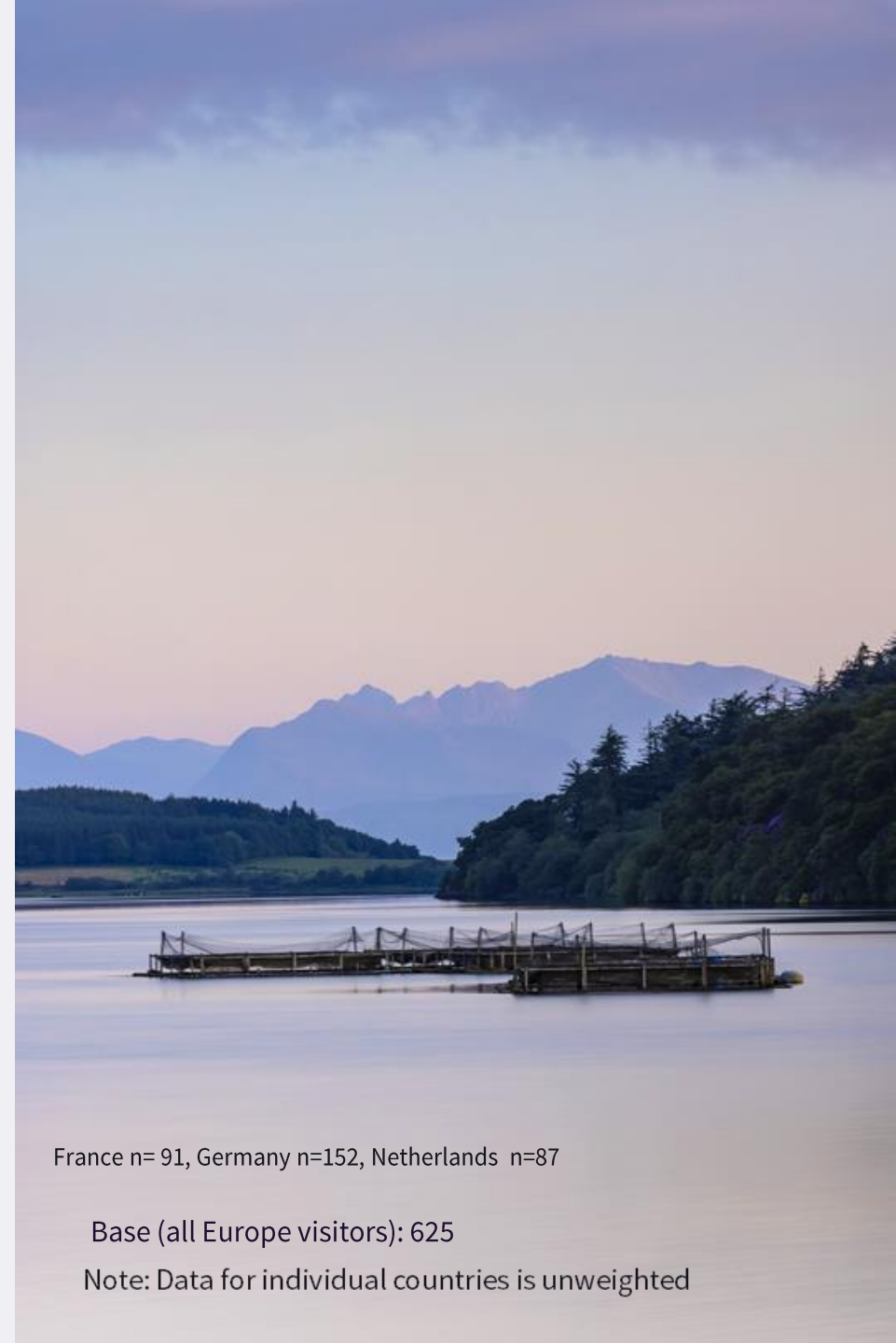
Visitors from France

29.2 weeks

Visitors from Germany

26.9 weeks

Visitors from Netherlands



France n= 91, Germany n=152, Netherlands n=87

Base (all Europe visitors): 625

Note: Data for individual countries is unweighted

1.1 When did European visitors start to plan their trip in Scotland: market summary



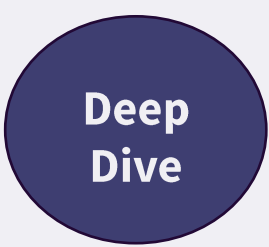
When started to plan trip	All European visitors	France	Germany	Netherlands	Spain and Italy
Less than 2 weeks	3%	4%	5%	1%	1%
2 to 4 weeks	7%	9%	4%	6%	10%
Subtotal: Within one month	10%	13%	9%	7%	11%
1-2 months	18%	22%	14%	16%	18%
3-6 months	42%	48%	41%	44%	44%
Subtotal: Less than 6 months	70%	84%	64%	67%	73%
7-12 months	21%	14%	22%	24%	23%
1-2 years	4%	2%	7%	3%	0%
Over 2 years	5%	0%	7%	6%	4%
Subtotal: More than 6 months	30%	16%	36%	33%	27%



Base (all Europe visitors): 625
 Countries listed above: France n= 91, Germany n=152, Italy and Spain n= 79, Netherlands n=87
 Note: data for individual countries is unweighted.

Q7 (Stage 2): How far in advance before travelling, did you start thinking about and planning this trip?

1.2 When did European visitors start to plan their trip in Scotland: additional analysis



Most European visitors (7 in 10) started planning their trip in the 6 months before they travelled, with the largest proportion doing so 3 to 6 months in advance. On average, visitors started planning their trip 24.9 weeks in advance of travel.



By visitor profile:

- Visitors from France tended to have a shorter planning period (17.5 weeks), compared to those from Germany (29.2) and the Netherlands (26.9,).
- No significant difference between first timers vs repeat visitors when it comes to lead time on holiday planning.

By type of holiday:

- European visitors on the trip of a lifetime had a longer lead in time (average 34.4 weeks) than other visitors (average 24.5 weeks).
- Those visiting family and friends tended to plan trips more spontaneously with 59% of them planning within 2 months prior to arrival (compared with only 26% of those taking pure leisure trips booking in that timeframe).
- The longer the trip then the earlier the planning process started. Of those who stayed 1-3 nights, 61% started planning within 2 months of their arrival in Scotland, compared to only 24% of those staying more than 14 nights.

2. What sources of information did European visitors use to research and plan their trip in Scotland?

In this section, we wanted to explore if European visitors did look for information to research and plan their trip, and the sources they used.

85%

The majority of European visitors used a source of information to help research and plan their trip

14%

One quarter did not look for information to help plan their trip in advance

1%

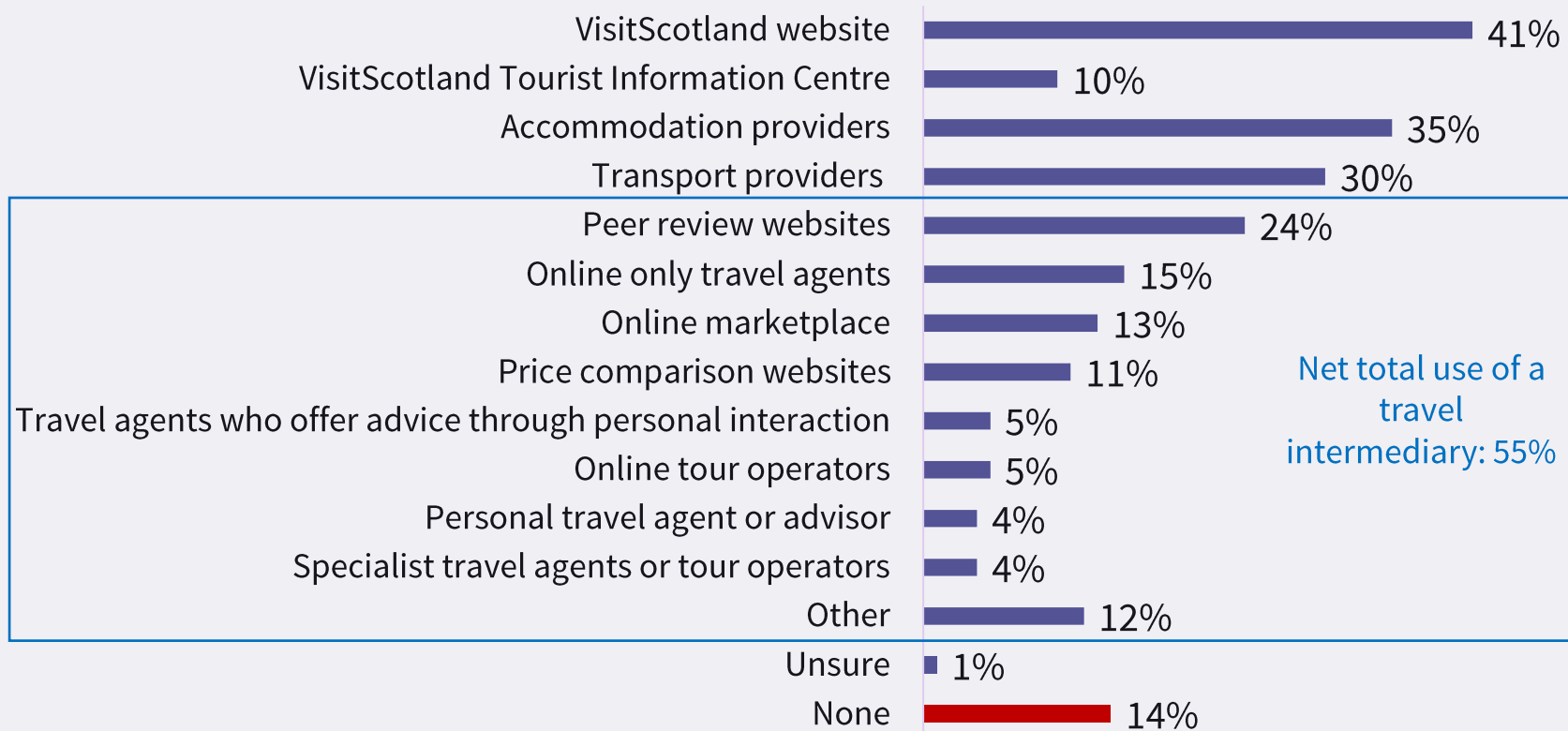
Unsure

2.1 Sources of information European visitors used to plan: breakdown



Of those visitors who used research and planned their trips, an average of 2.5 sources were used.

VisitScotland the website and iCentre were mostly mentioned; 55% used a type of travel intermediary for holiday planning - this figure is higher than UK visitors' (31%) use of intermediary in planning stage but lower than long haul market (68%).



On average 2.5 sources used



Base (all Europe visitors): 625

Note: This is a multiple-choice question, therefore respondents may have selected multiple channels, leading to the total percentage exceeding 100%.

Q9 (Stage 2): Which, if any, of the following providers, agents, websites and other intermediaries did you use to help you research and plan your trip in Scotland?

2.2 What sources of information did European visitors use to research and plan trip:

Additional analysis

Deep
Dive

- Repeat visitors from Europe (37%) were more likely than first time visitors (24%) to use transport providers, and repeat visitors are more likely to use VisitScotland's website (46%) than first timers (37%) when planning holidays.
- Visitors aged 16-34 years old were the most likely age group to use price comparison websites (22%).
- The VisitScotland website (59%) and transport providers (48%) was more often mentioned by families than other life stage groups.
- There were no significant differences by country for sources of information.

3. When did European visitors book their trip to Scotland?

79% of European visitors reported that they booked their trip within 6 months of travel.

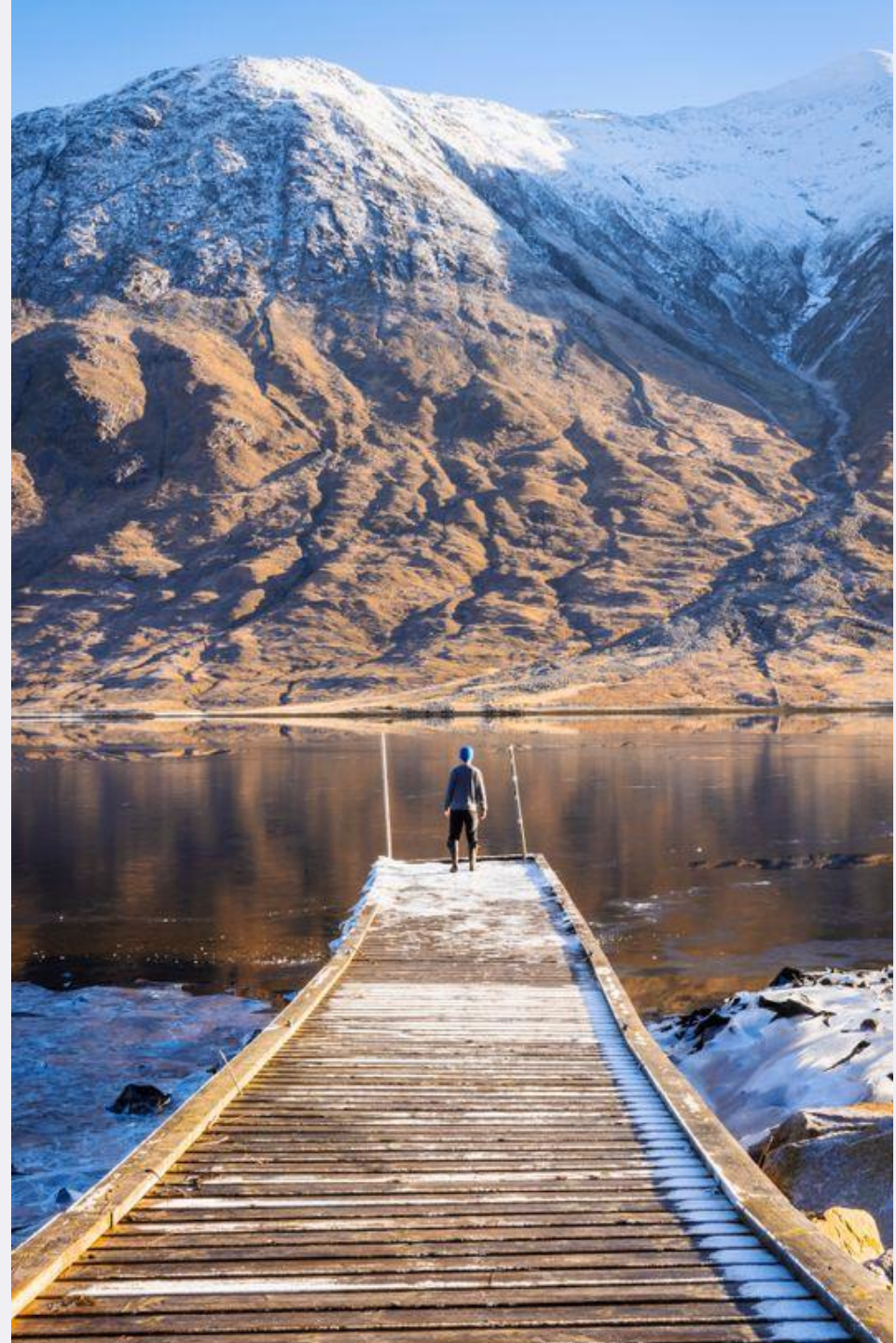
6% did not book in advance

15.5 weeks

Of those who booked in advance, on average, they booked their trip 15.5 weeks before travel.

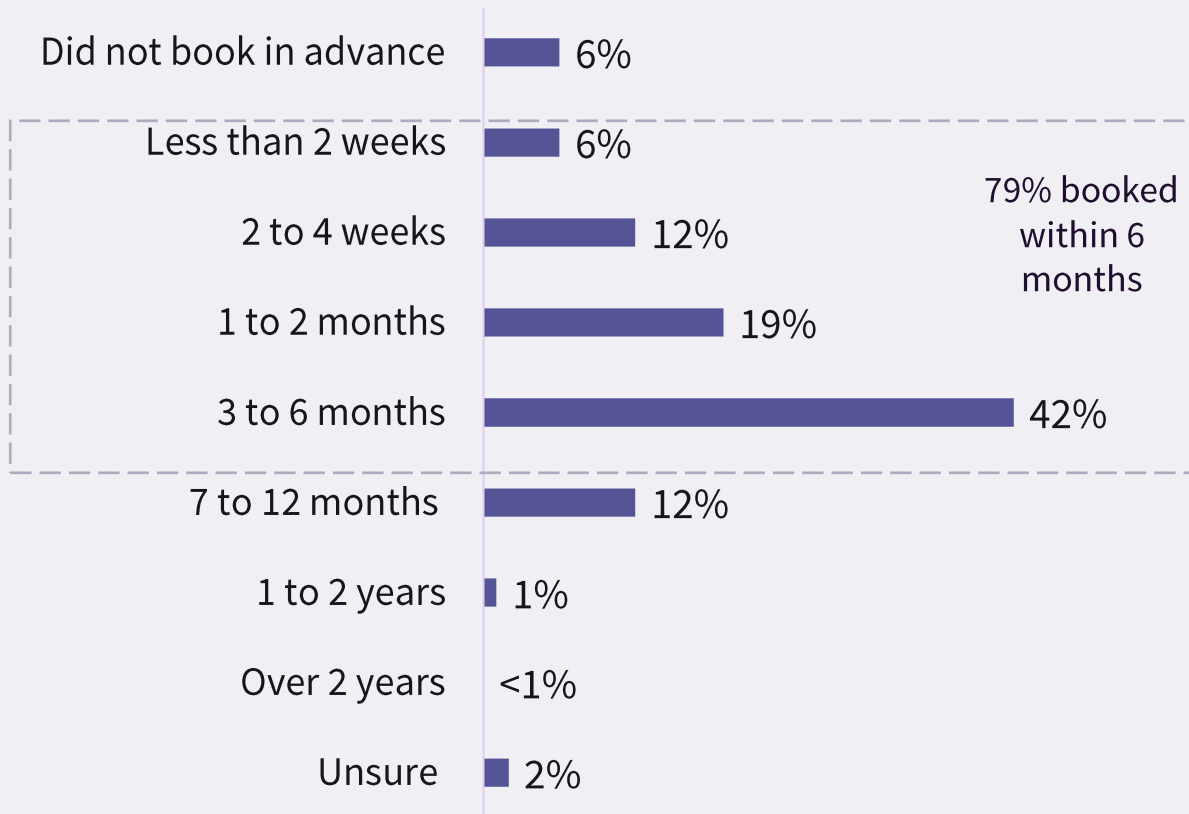
Base (all Europe visitors): 625

Q7 (Stage 2): How far in advance before travelling, did you start thinking about and planning this trip?



3.1 When did European visitors book their trip to Scotland: additional analysis

The vast majority of visitors from Europe tended to book their trip to Scotland 6 months in advance with an average booking time of 15.5 weeks before travel.



By profile of visitors:

- Visitors from France were more likely to book less than a month in advance (26%), compared to visitors from the Netherlands (11%).
- No significant difference between first time visitors and repeat visitors.

By type of holiday:

- Visitors who were on the trip of a lifetime booked longer in advance than other visitors – on average 20.3 weeks before travel.
- Solo travellers were more likely to book their trip less than 2 months (63%) compared to other travellers (35%).
- The more areas they visited, the earlier they tended to book with 58% of those who toured around Scotland and staying in 2 or more places, booking their holiday at least 3 months in advance (compared to 44% of those only visiting one region who booked within that timeframe).

3.2 When did European visitors book their trip to Scotland: additional analysis

Deep Dive

European visitors started planning their trip **24.9 weeks** in advance and booked **15.5 weeks** in advance of travel; leaving a 9.4 week gap between the start of the planning process and making the booking on average.

Those who started planning earlier, took more time to make the actual booking. i.e. those who started planning over a year prior to visit, 40% booked trips within 3 to 6 months before travel, with over 30% booking between 7 and 12 months in advance.

When started planning the trip

When booking was made

	Less than 4 weeks	1 to 2 months	3 to 6 months	7 to 12 months	Over a year
Less than 2 weeks	72%				
2 to 4 weeks	77%				
1 to 2 months	39%	51%			
3 to 6 months	4%	21%	70%		
7 to 12 months	6%	3%	44%	43%	
Over a year	4%	5%	40%	31%	9%

4. How did European visitors book their accommodation in Scotland

39%

Booked directly through the accommodation provider

39%

Booked via an online only travel agent

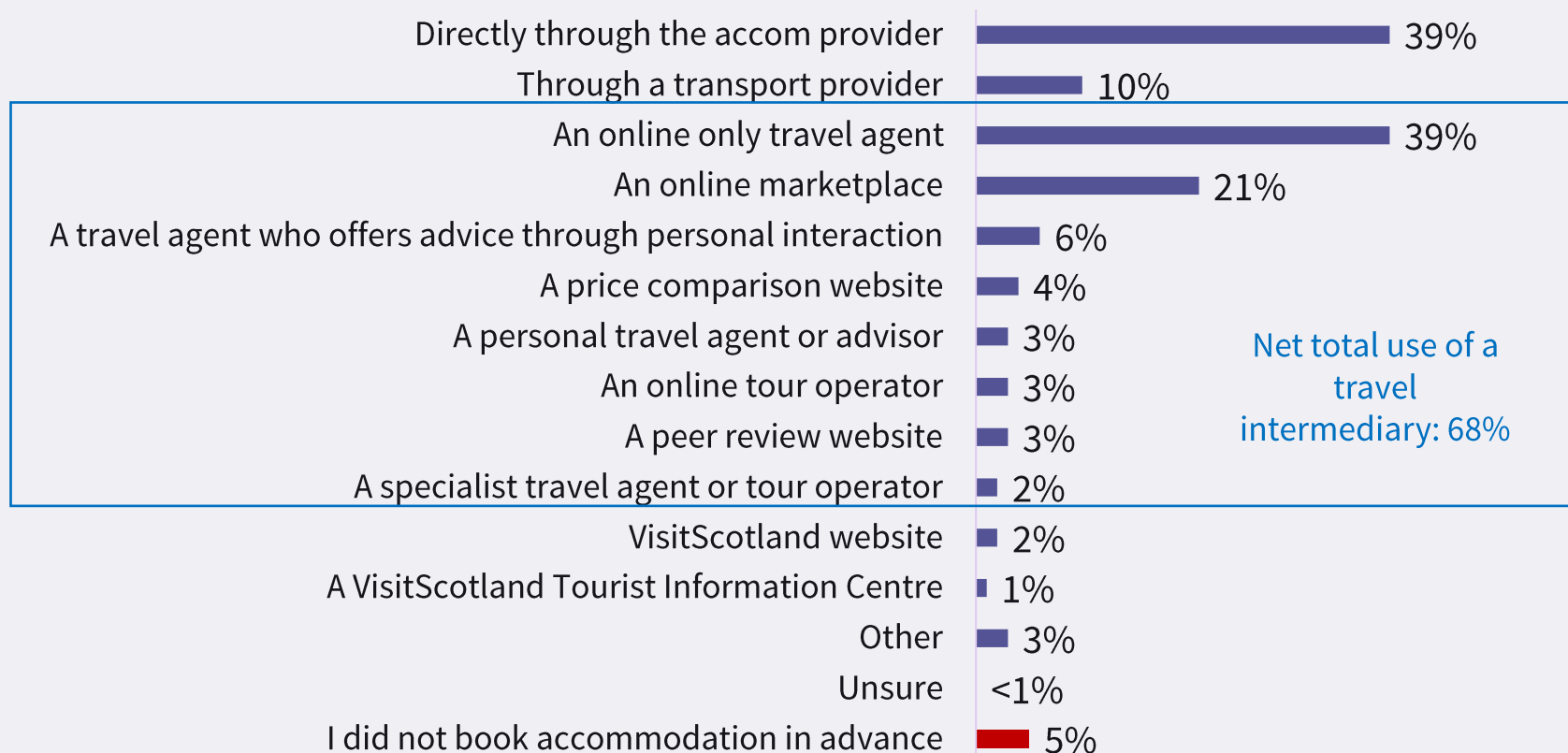
68%

Net total use of a travel intermediary for accommodation booking



4.1 Breakdown of sources used by European visitors to book their accommodation in Scotland

With regards to accommodation booking, travel intermediaries play a significant role with 68% citing their use; Direct booking with the accommodation provider is also a popular way amongst European visitors.



4.2 How European visitors booked their accommodation:

Additional analysis

Deep
Dive

Visitors from the Netherlands were more likely than visitors from other countries to book via a transport provider (20%).

Repeat visitors were more likely to book directly with the accommodation provider (45%) than first time visitors (34%).

Pre-nesters were more likely to book through an online travel agent (51%) than other life stage groups.

5. How did European visitors book their travel to Scotland

67%

Booked directly with the transport provider

16% used an online only travel agent

10% used a price comparison website

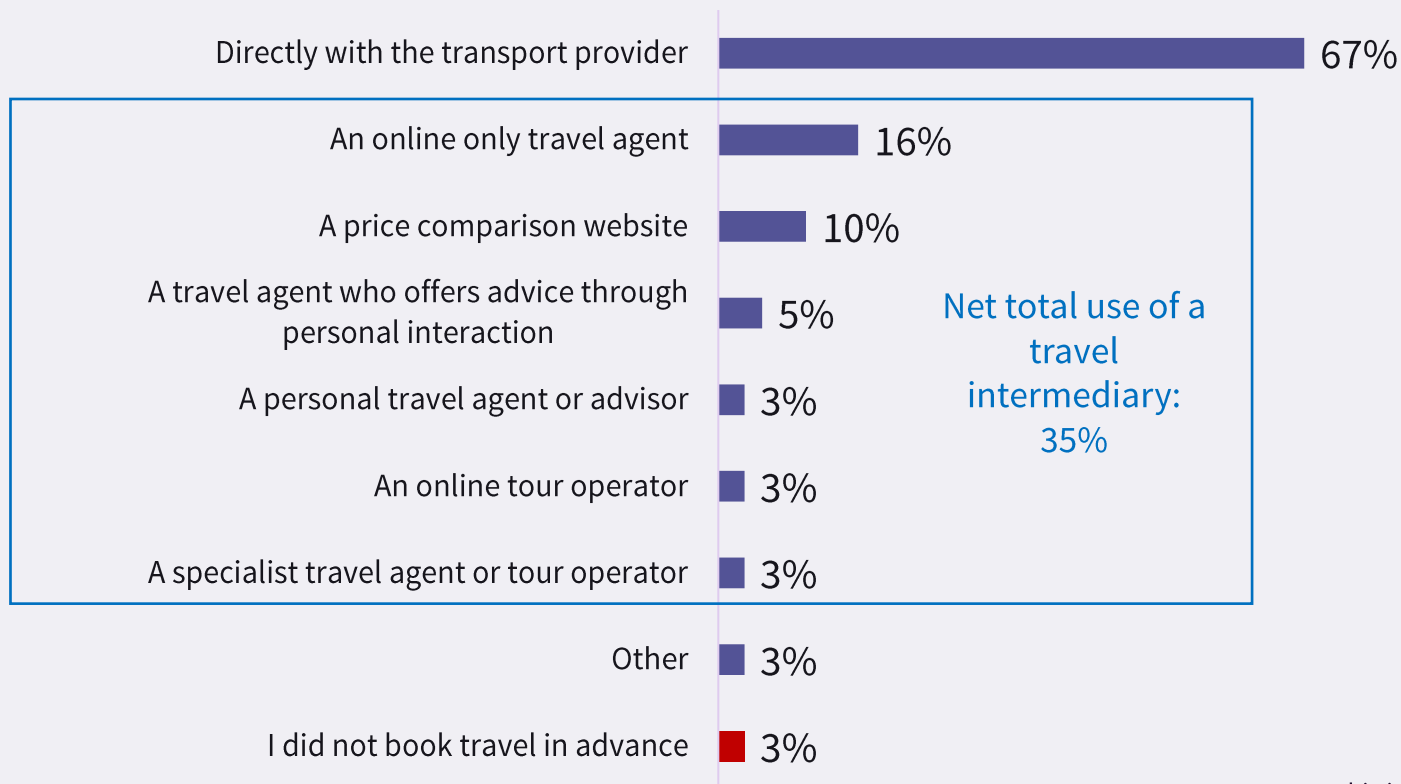
The net total who used a travel intermediary was 35%



5.1 Breakdown of sources used by European visitors to book their travel to Scotland

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, 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%).

Note: This is a multiple-choice question, therefore respondents may have selected multiple channels, leading to the total percentage exceeding 100%.

6. How did European visitors book their activities and experiences in Scotland

44%

of European visitors booked activities and experiences in advance of their trip in Scotland

Of those that did book in advance,

78%

booked directly through the providers website

Q14 (Stage 2): Did you book any paid activities or experiences in Scotland in advance of your short break or holiday? – Base (all Europe: 625

Q15 (Stage 2): How did you book your activities or experiences within Scotland before your trip? – Base (those who booked activities): 266

Q16 (stage 2): Why did you not book any paid activities or experiences before your trip? – Base (those who did not book activities): 356

Note: Data for individual countries is unweighted

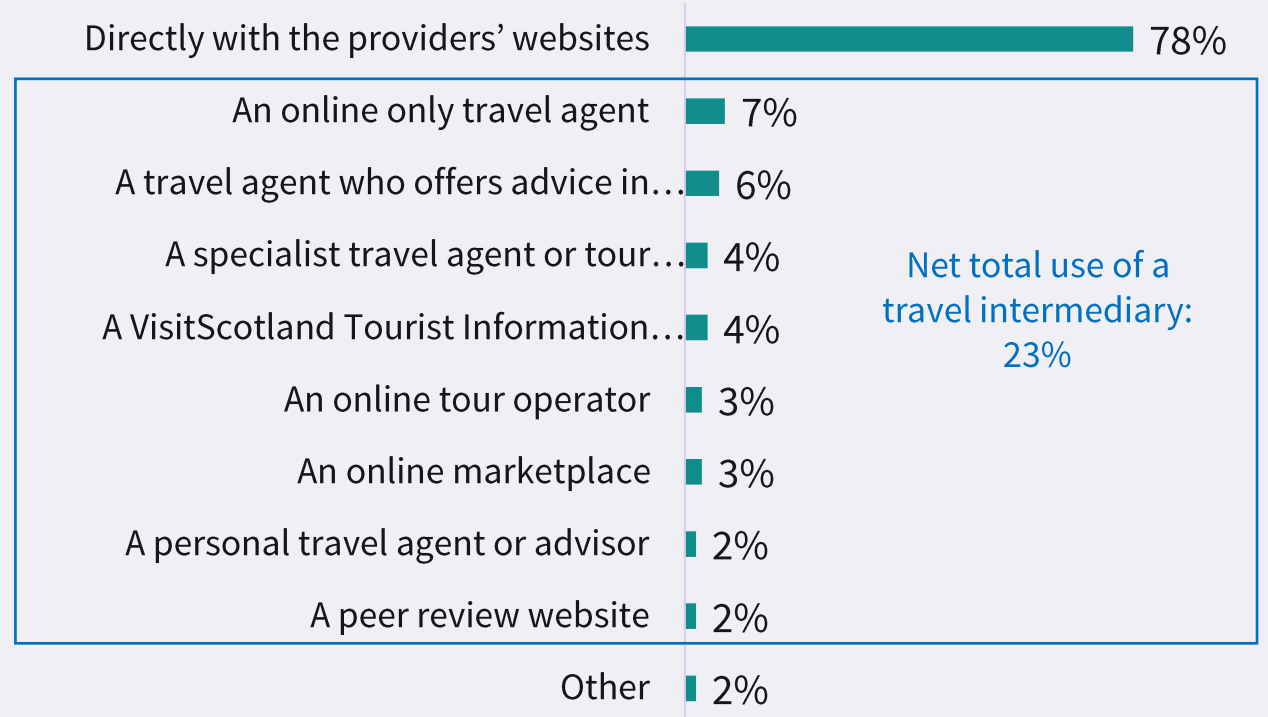
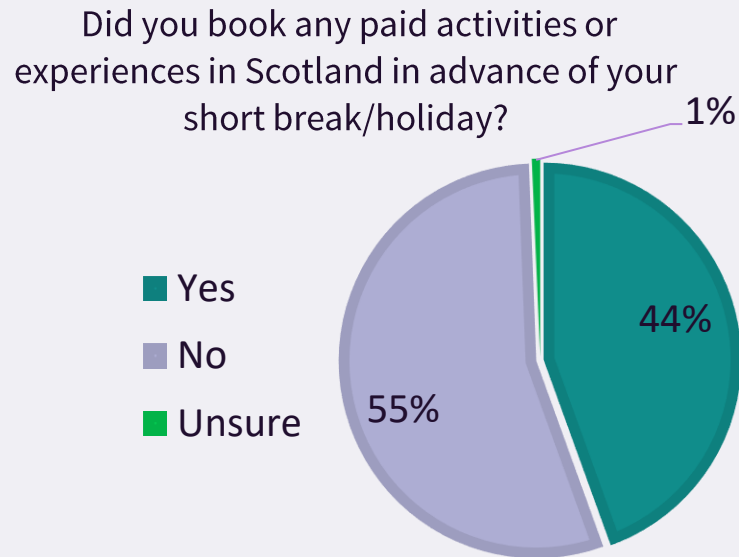


6.1 Breakdown of sources used by European visitors to book activities and experiences in Scotland

44% of European visitors booked activities or experiences in advance of their holiday; visitors from the Netherlands (51%) and Spain/Italy (53%) were more likely to book activities in advance than those from France (34%) and Germany (34%).

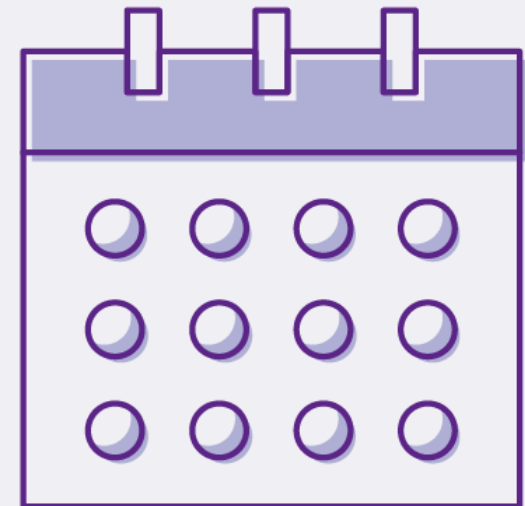
The majority of whom booked in advance did so directly with the provider (78%), 23% used a type of travel intermediary.

The main reasons for not booking in advance were wanting to wait until they were on the trip to book (59%) and activities did not need to be booked (42%).



Definitions used within this report (1)

- 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



Definitions used within this report (2)

All types of travel intermediaries

Travel agents who offer advice through personal interaction, such as high street shop or telephone (e.g., TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT)

CODE

3

Personal travel agent or advisor (someone who creates bespoke tailor made holidays specifically for you)

4

Online only travel agents who offer a wide range of travel deals online, such as flights, accommodation, car hire, etc. (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

5

Online tour operators (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

6

Online marketplace – a website or app that connects the traveller with accommodation and experience providers directly (e.g., Airbnb, VRBO)

7

Price comparison websites – a website or app that aggregates travel deals, such as flights and accommodation, from other sites (e.g. Skyscanner, Kayak.com, Priceline.com, lowestfare.com)

8

Peer review websites – a website or app that collates reviews from other travellers (e.g. TripAdvisor)

9

Specialist travel agents or tour operators who focus on specialist interest travel and tours, e.g., golf, walking, cycling, cruises

10

Market specific examples in the questionnaire:

Code 3 – Travel agents

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

Code 5 - Online Travel agents

- Germany – Booking.com, Expedia, HRS
- France – Booking.com, Expedia, Voyage Privé
- Spain - Logitravel, eDreams, Booking.com
- Italy – Expedia, eDreams, Booking.com
- All others - Booking.com, Expedia

Code 6 – Online tour operators

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI



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