

SCOTLAND VISITOR SURVEY 2023

UNDERSTANDING THE VISITOR JOURNEY LONG HAUL VISITORS (34 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

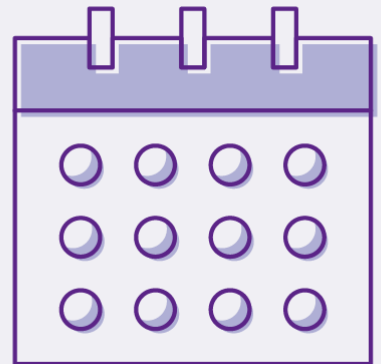
Definitions used within this report

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 LONG HAUL VISITORS

Key insights: Long haul Visitors Planning (1)

62% of long haul visitors started researching and planning more than 6 months before they travelled.

Long haul visitors who were on a trip of a lifetime were even more likely to start planning further in advance.

Those who stayed longer in Scotland started to plan earlier.

On average long haul visitors started to research and plan 43.1 weeks in advance.



Key insights: Long haul Visitors Planning (2)

90% did use a source of information to plan.

Accommodation providers, transport providers and travel intermediaries are the most cited channels, together with VisitScotland's website.

Travel intermediary channels play a significant role at both the holiday planning and booking stage for long haul visitors, with 68% using a type of intermediary at the holiday research and planning stage (higher than other markets).

9% of long haul visitors did not look for information to help plan their trip in advance.



Key insights: Long haul Visitors (Booking)

75% of long haul visitors reported that they booked their trip within 3 to 12 months before travel.

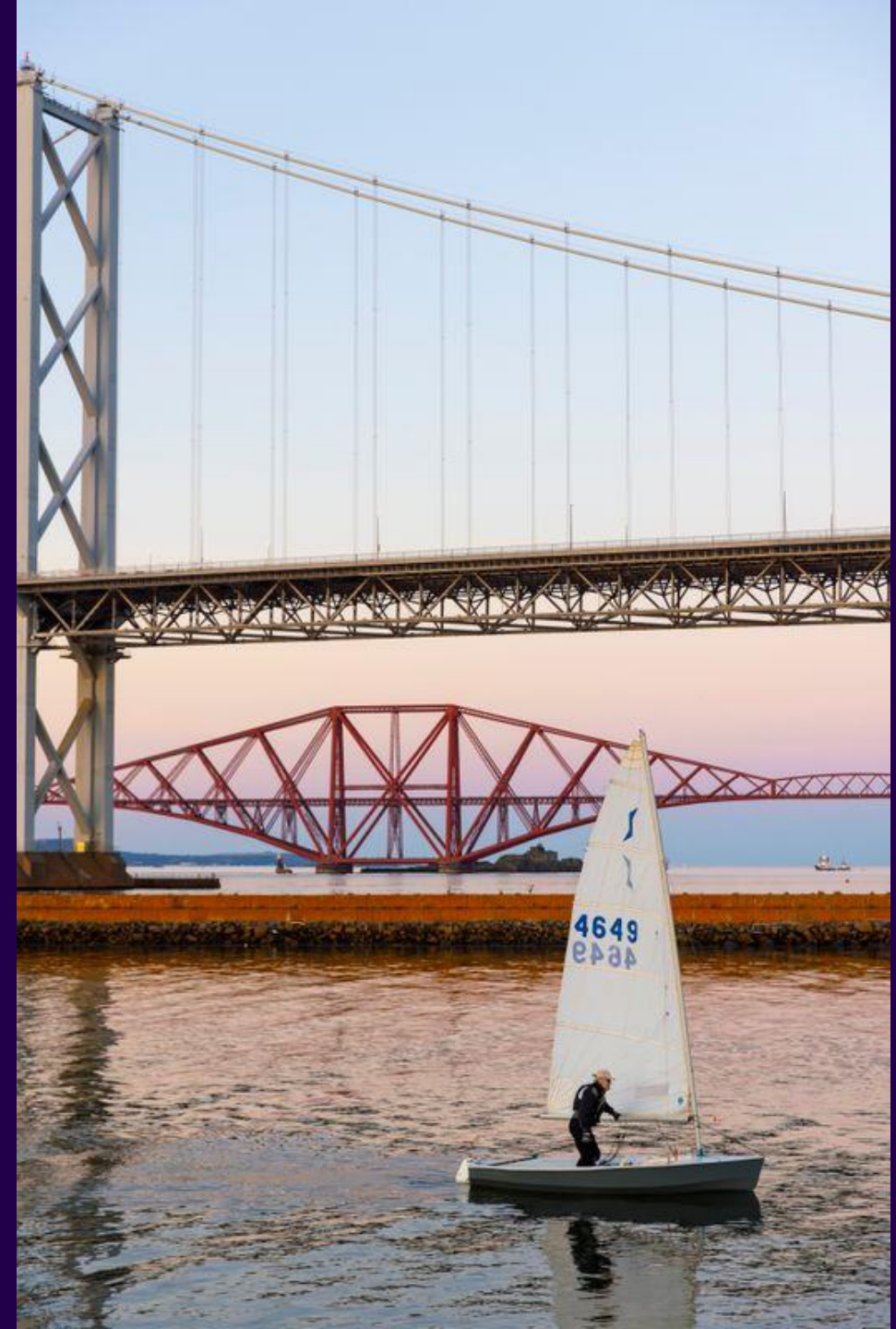
4% did not book in advance of their trip.

Long haul visitors saw the longest lead times in both planning and booking. And they had the longest time lag between planning the trip and confirming the final booking, compared to other markets.

On average long haul visitors booked 25.3 weeks in advance.

Those who claimed have less knowledge about Scotland prior to their visit tended to book accommodation and travel as one package (22%) compared to those who claimed to know Scotland well (6%).

Price comparison websites were used more by those under 44 compared to those who are older than 55.



Key insights: Long Haul Visitors (Booking elements)

Accommodation

54% booked directly with providers.

67% used a type of intermediary for accommodation booking.

Transport to Scotland

67% booked directly with a transport provider.

45% used a type of travel intermediary.

Activities & experiences

63% booked their activities and experiences in advance of their trip. Amongst those who booked in advance, 71% did so directly with the activity or experience providers.



UNDERSTANDING THE VISITOR JOURNEY

LONG HAUL VISITORS

Detail

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

62%

of long haul visitors started researching and planning their trip in Scotland more than 6 months before they travelled.

On average:

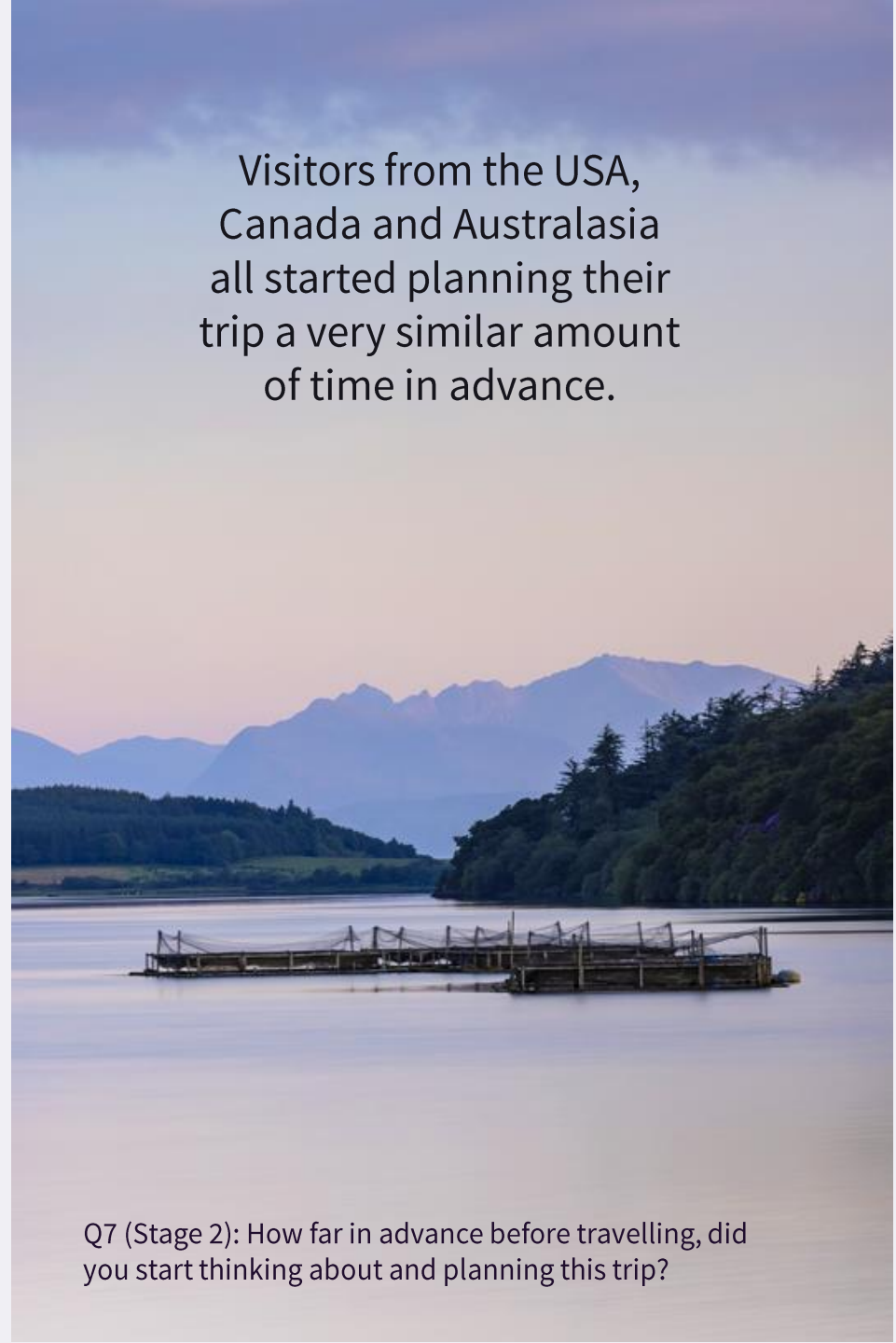
long haul visitors started planning their trip

43.1 weeks

in advance of travel

Base (all long haul visitors): 795

Visitors from the USA, Canada and Australasia all started planning their trip a very similar amount of time in advance.



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

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

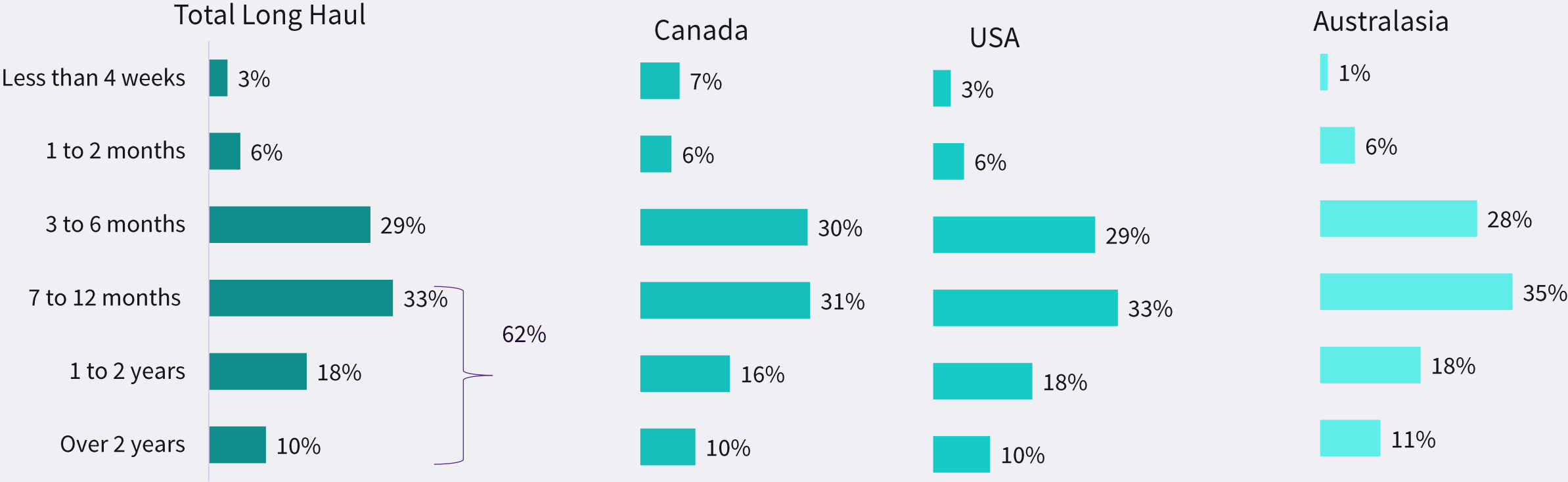


When started to plan trip	Long Haul	USA	Canada	Australasia
Less than 2 weeks	1%	2%	1%	0%
2 to 4 weeks	2%	2%	7%	1%
Subtotal: Within one month	3%	3%	7%	1%
1-2 months	6%	6%	6%	6%
3-6 months	29%	29%	30%	28%
Subtotal: Less than 6 months	38%	38%	43%	36%
7-12 months	33%	33%	31%	35%
1-2 years	18%	18%	16%	18%
Over 2 years	10%	10%	10%	11%
Subtotal: More than 6 months	62%	62%	57%	64%

1.2 When did long haul visitors start to plan their trip in Scotland: graphs

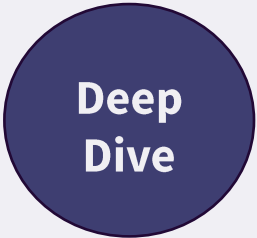
Most long haul visitors (6 in 10) started planning their trip more than 6 months before they travelled, with almost 3 in 10 saying their planning started more than a year in advance. On average, long haul visitors started planning their trip 43 weeks in advance of travel.

Visitors from the USA, Canada and Australasia all started planning their trip a very similar amount of time in advance.



1.3 When did long haul visitors start to plan their trip in Scotland:

Additional analysis



By type of visitors:

- 39% of those who were in Scotland for once in a lifetime trip were more likely to start planning the trip over 2 years in advance, significantly earlier than other type of visitors.
- Solo travellers (16%) were more likely to plan their trip within a month of travel than other traveller types. The bigger the travel party is then the earlier the planning process starts.
- No significant differences between VFR group and leisure holiday visitors.

By length of journey:

- Those who stayed longer in Scotland tended to start planning earlier. 39% of those who stayed more than 14 nights, started planning at least 12 months in advance, compared to only 22% of those who stayed less than 7 nights.

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

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

90%

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

9%

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

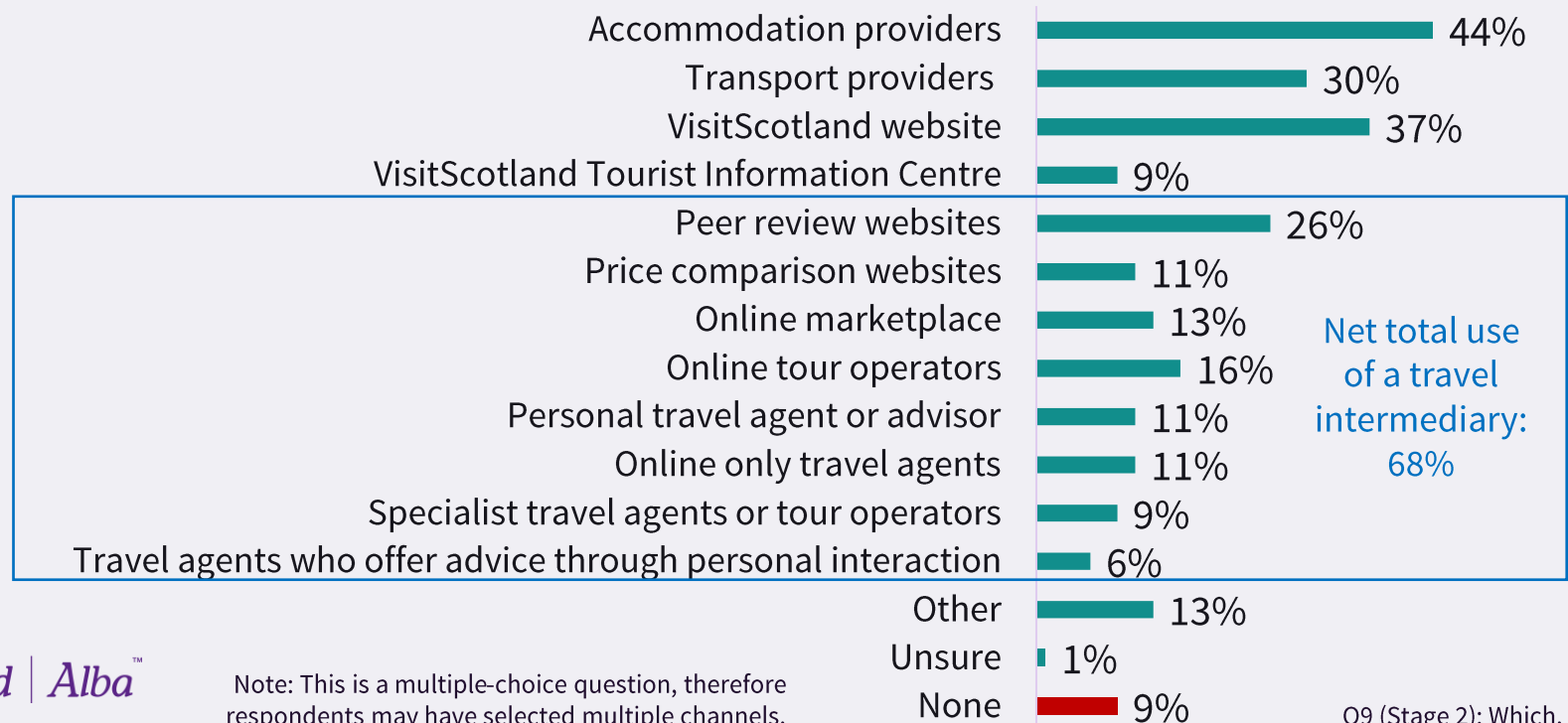
1%

Unsure

2.1 Sources of information used by long haul visitors to plan trip: breakdown

One in ten long haul respondents didn't use any sources to research and plan their trip to Scotland.

For those who used any type of resources, an average 2.4 types of sources were used at the holiday research stage. Accommodation providers, transport providers, VisitScotland's website, together with peer review sites were mostly mentioned. Intermediary channels play a significant role at the holiday research and planning stage. 68% long haul visitors used a type of intermediary at the holiday research and planning stage.



On average 2.4 sources used

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

Additional analysis



Deep
Dive

First time visitors from long haul destinations (14%) were more likely to use personal travel agents than repeat visitors (8%). Similarly, personal travel agents were used more by those who claimed to have less knowledge about Scotland prior to travel.

Price comparison websites were used more by those under 44 (16%) compared to those who are older than 55 (8%).

Peer review websites tended to be most often used by pre-nesters (41%), while this group was the least likely to use travel agents (14%).

Usage of online marketplaces was higher for families (22%) and couples (17%) than solo travellers (3%) or friendship groups (7%).

There were no significant differences by country for sources of information.

3. When did long haul visitors book their trip to Scotland?

75% of long haul visitors reported that they booked their trip within 3 and 12 months before travel.

21% booked within 2 months of travel

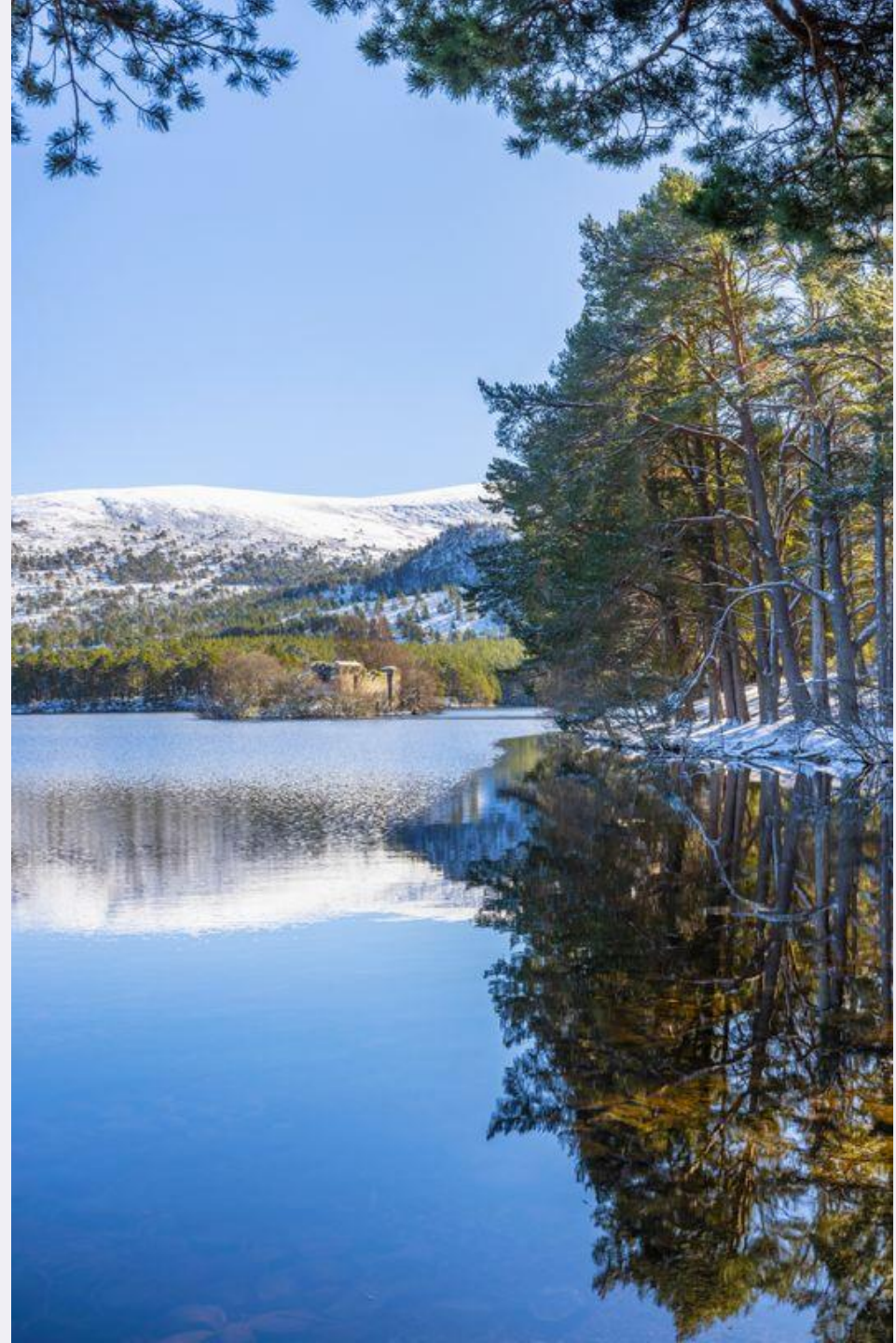
4% did not book in advance

25.3 weeks

Of those who booked in advance, on average, they booked their trip 25.3 weeks before travel.

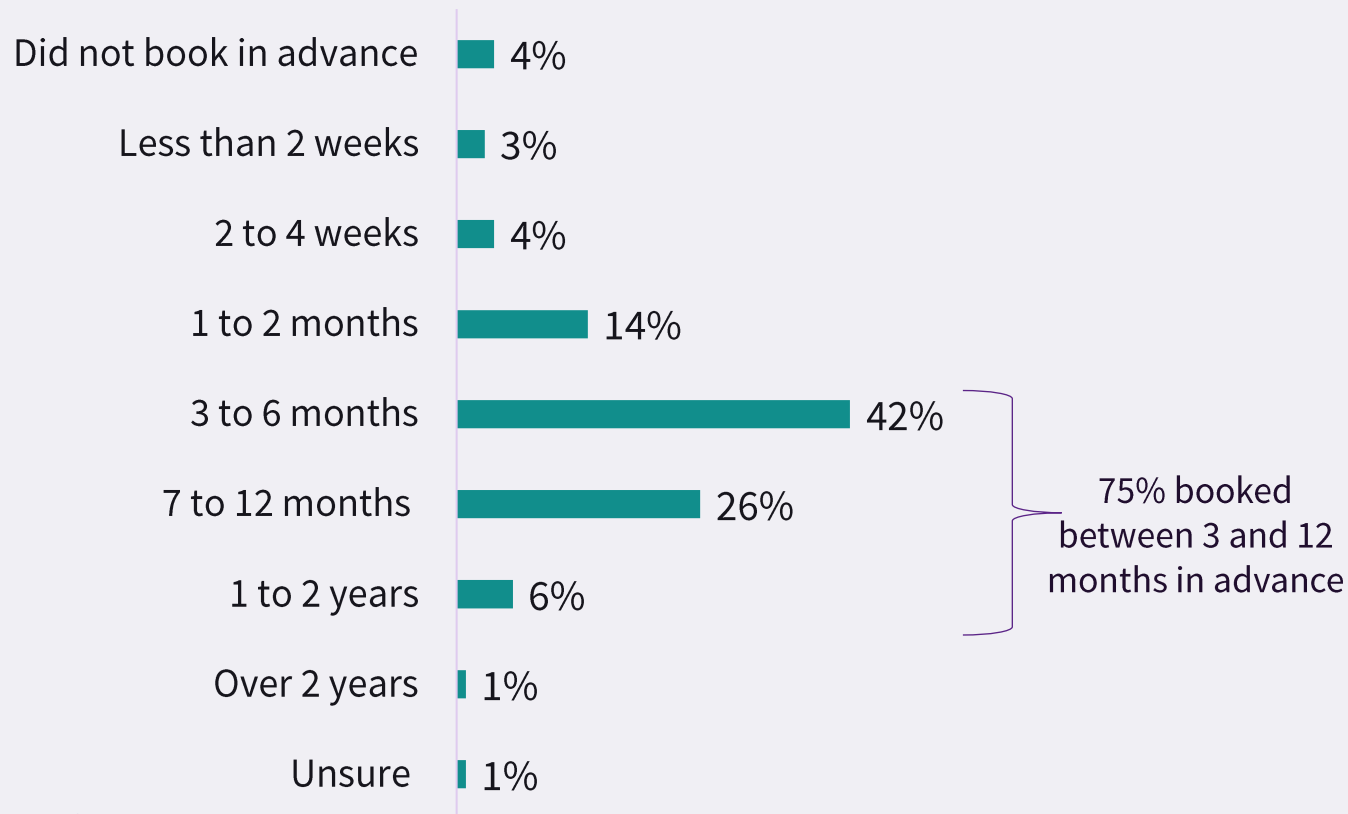
Base (all Long haul visitors): 795

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



3.1 When did long haul visitors book their trip to Scotland: graphs

The majority of long haul visitors (almost seven in ten) booked their trip to Scotland between 3 and 12 months before travelling.



Amongst those who booked in advance, the average time of booking was 25.3 weeks before travel.

Pre-nesters were the most likely to book within a month of travel (21%).

Visitors who were on the trip of a lifetime booked longer in advance than other visitors, on average 29.6 weeks before travel.

Base (all Long haul visitors): 795

Q10 (Stage 2): How much time was there between booking your holiday and the start of your holiday?

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

Deep Dive

Long haul visitors saw the longest lead times in both planning and booking, as well as having the longest time lag between planning the trip and confirming the final booking. On average, visitors started planning their trip **43.1 weeks** in advance and booked **25.3 weeks** in advance of travel, and there was an 18-week gap between the start of the planning process and making bookings.

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	1 to 2 years	Over 2 years
Less than 4 weeks	80%					
1 to 2 months	32%	57%				
3 to 6 months	5%	27%	64%			
7 to 12 months	2%	4%	48%	42%		
1 to 2 years	1%	5%	24%	44%	24%	
Over 2 years	1%	7%	26%	36%	14%	14%

4. How did long haul visitors book their accommodation in Scotland

54%

Booked directly through the accommodation provider

22% Booked accommodation via an online only travel agent (e.g. Booking.com, Expedia)

20% Booked accommodation via an online market place (e.g., Airbnb, HomeAway)

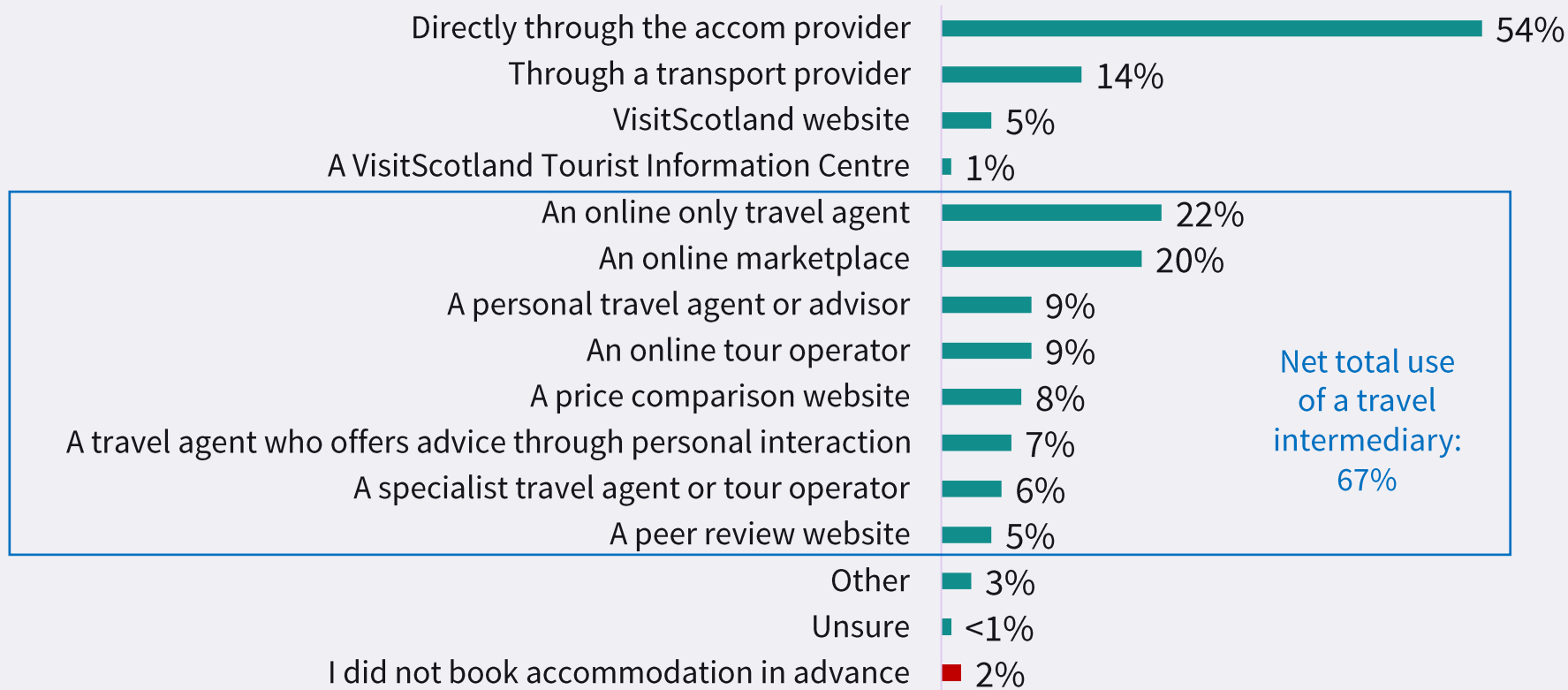
67% Net total use of a travel intermediary for accommodation booking



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

Over half of long haul visitors booked their accommodation directly with the provider, with one in five using an online travel agent or an online marketplace.

67% of long haul visitors used a type of intermediary when booking accommodation.



4.2 How long haul visitors booked their accommodation:

Additional analysis

Deep Dive

- Visitors from Australasia were more likely to use an online travel agent (35%) or an online marketplace (31%) than visitors from the USA (17% for each).
- Pre-nesters (30%) and families (37%) were more likely to use an online marketplace than older independents (20%) and retirement aged visitors (15%).
- There were no significant differences between first time and repeat visitors within the long haul markets sample.

5. How did long haul visitors book their travel to Scotland

67%

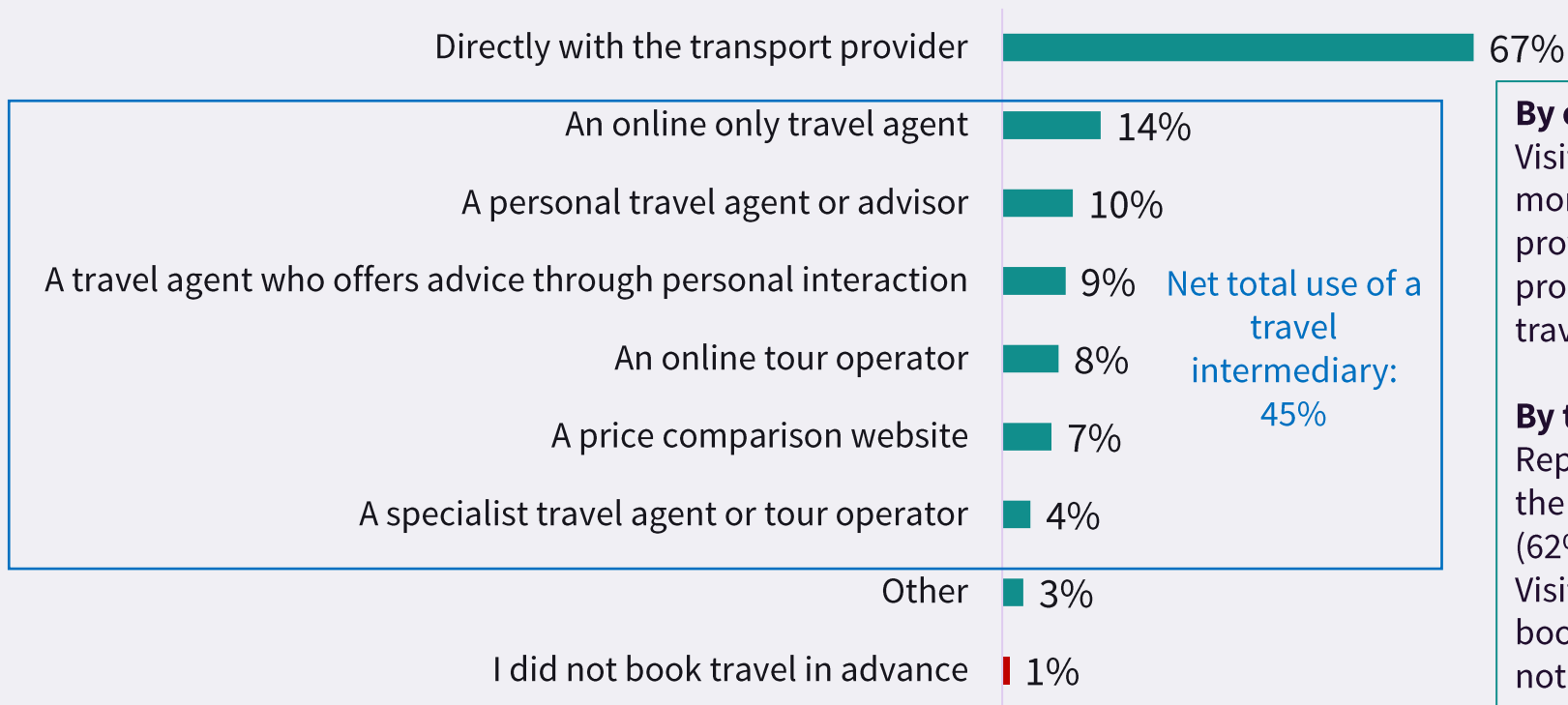
Booked their travel direct with a travel provider

The net total who used a travel intermediary was 45%



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

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%).

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

63%

of long haul visitors booked activities and experiences in advance of their trip in Scotland

Of those that did book in advance,

71%

booked directly through the providers website

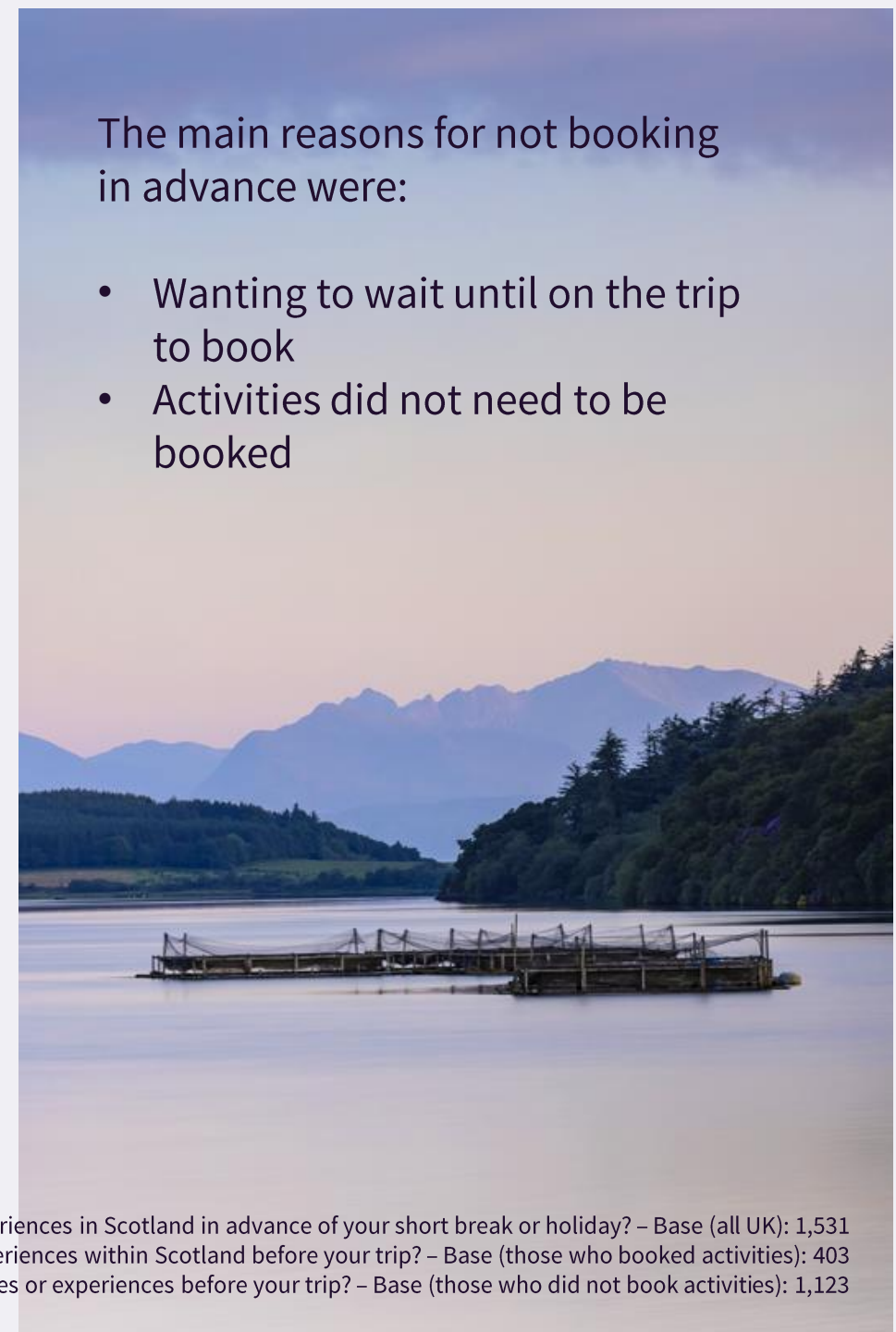
Long haul visitors were more likely than those from the UK or Europe to book via a travel intermediary.

Net total use of a travel intermediary: 45%

Q14 (Stage 2): Did you book any paid activities or experiences in Scotland in advance of your short break or holiday? – Base (all UK): 1,531
Q15 (Stage 2): How did you book your activities or experiences within Scotland before your trip? – Base (those who booked activities): 403
Q16 (stage 2): Why did you not book any paid activities or experiences before your trip? – Base (those who did not book activities): 1,123

The main reasons for not booking in advance were:

- Wanting to wait until on the trip to book
- Activities did not need to be booked

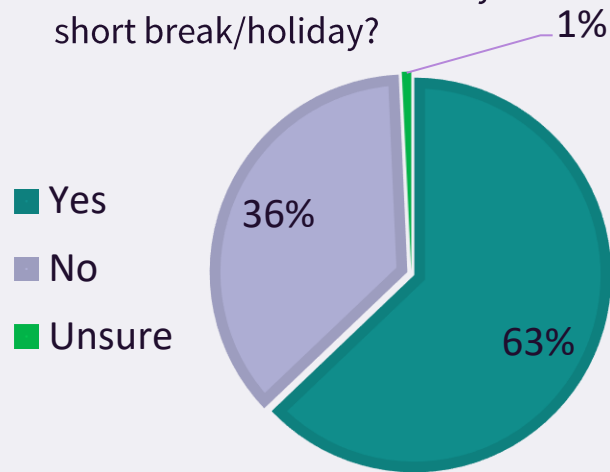


6.1 Methods used to book activities and experiences: Long haul

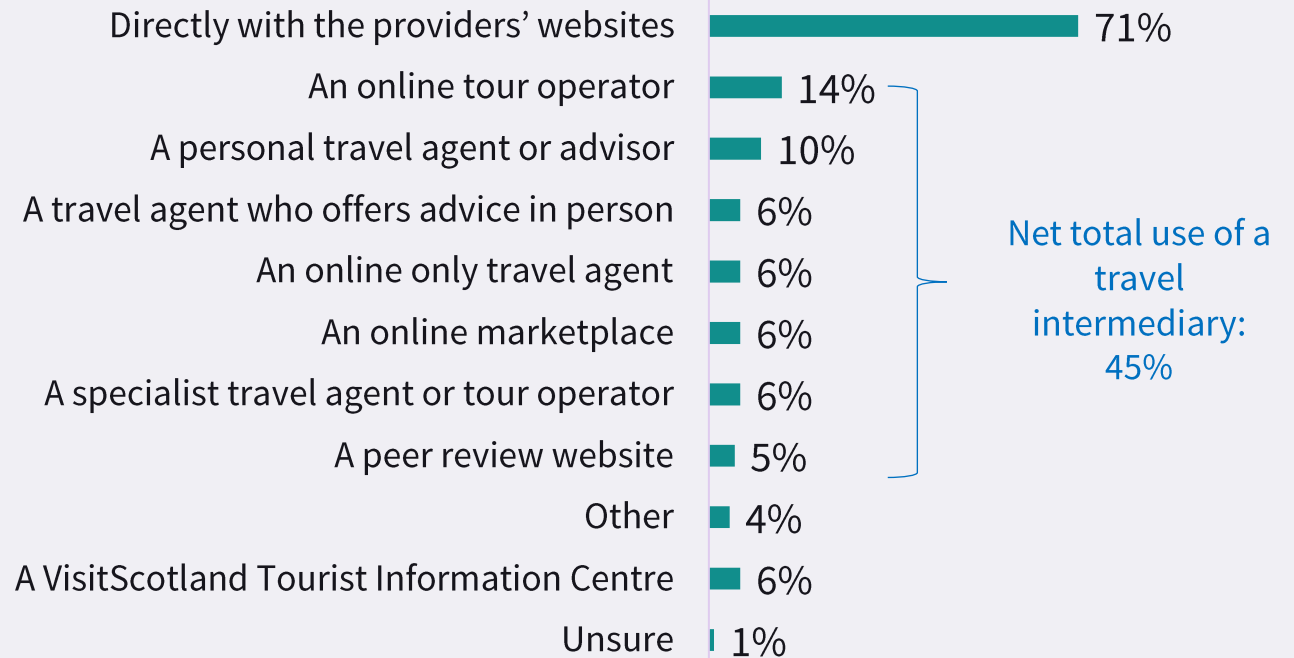
63% of long haul visitors booked activities or experiences prior to their arrival in Scotland (highest of all markets). Amongst those who booked in advance, over 70% booked directly with the provider. Long haul visitors were more likely than those from the UK or Europe to book via a travel intermediary.

The main reasons for not booking in advance were wanting to wait until they were on the trip to book (50%) and activities did not need to be booked (44%).

Did you book any paid activities or experiences in Scotland in advance of your short break/holiday?

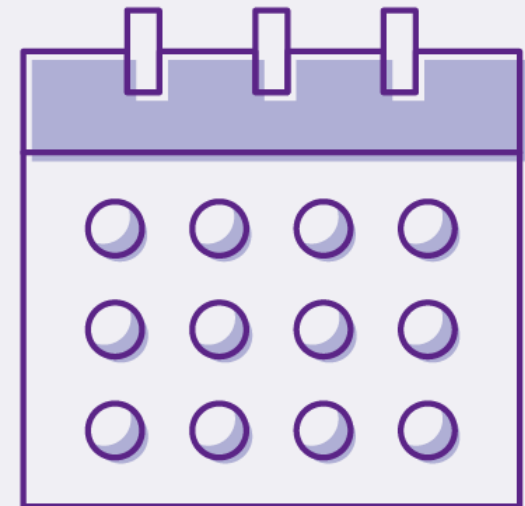


North America visitors were more likely to book activities in advance (67%) than visitors from Australasia (49%).



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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August 2024