

# SCOTLAND VISITOR SURVEY 2023

## UNDERSTANDING THE VISITOR JOURNEY SUMMARY (30 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?

# Contents

## Trip planning and booking: summary

[Background](#)

[Overview](#)

[UK visitors](#)

[European visitors](#)

[Long haul visitors](#)

[Definitions](#)

# 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

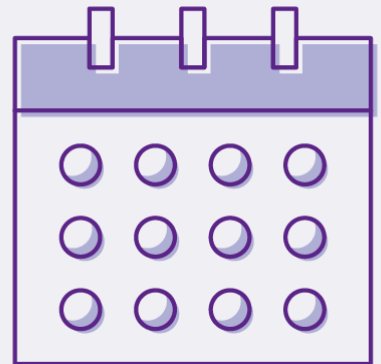
# Definitions used within this report

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.



# 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)

# Overview (3)

**What  
proportion of  
visitors looked  
for information  
to help them  
plan their trip**





# Overview (4)

How far in advance did visitors start to *plan* their trip to Scotland

On average

UK  
visitors

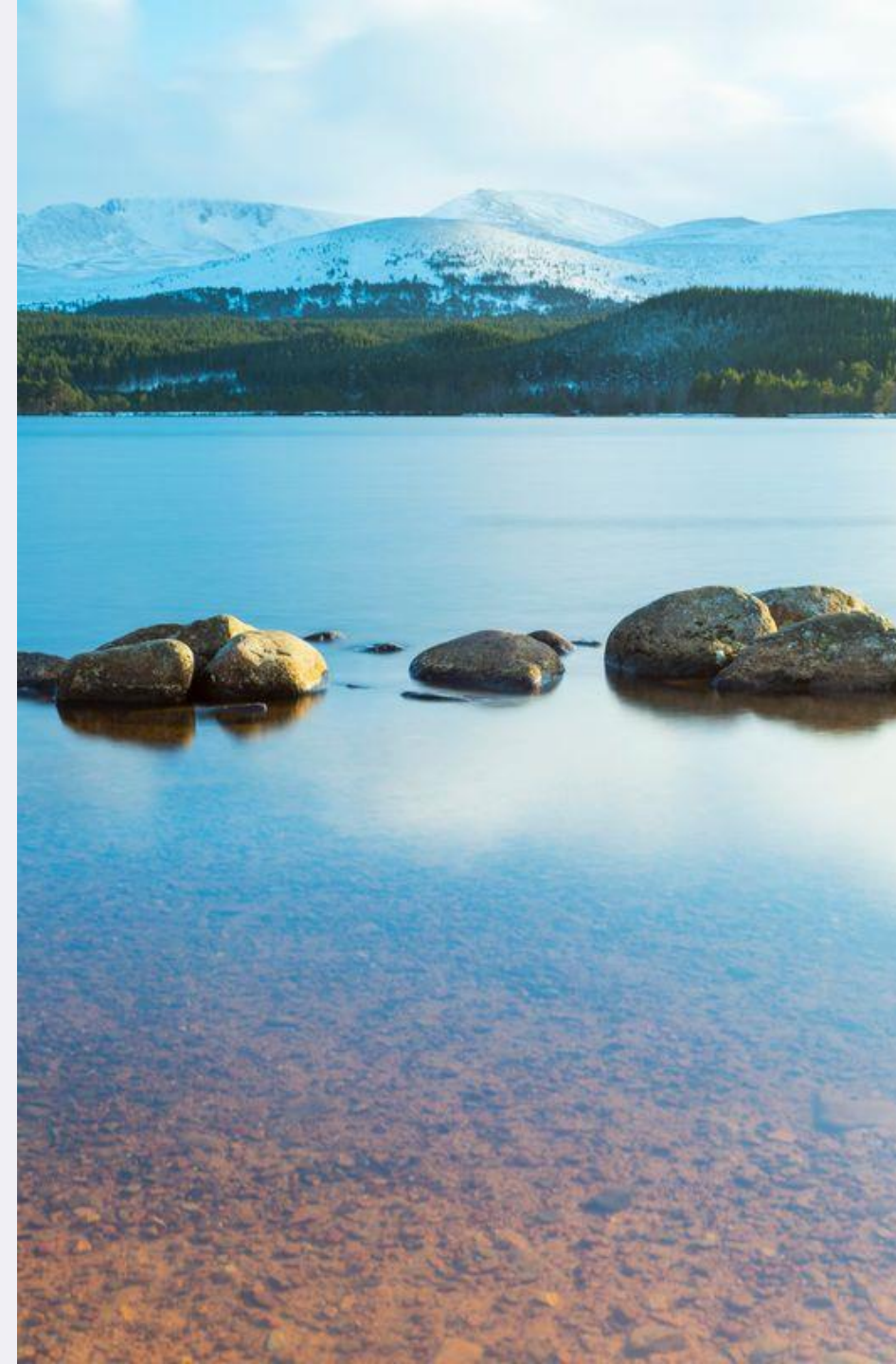
**19.7 weeks  
in advance**

European  
visitors

**24.9 weeks  
in advance**

Long haul  
visitors

**43.1 weeks  
in advance**



# Overview (5)

## How far in advance did visitors *book* their trip to Scotland

On average

UK  
visitors

**16.3 weeks  
in advance**

European  
visitors

**15.5 weeks  
in advance**

Long haul  
visitors

**25.3 weeks  
in advance**



# Overview (6)

## Booking elements of the trip:

## those who booked directly with a provider

	UK	Europe	Long haul
Booked accommodation directly with the provider	64%	39%	54%

	UK	Europe	Long haul
Booked transport directly with the provider	29%	67%	67%

	UK	Europe	Long haul
Booked activities and experiences in advance of arrival	29%	44%	63%
<b>(Those who booked in advance) Booked activities and experiences directly with a provider</b>	89%	78%	71%

# Overview (7)

## Booking elements of the trip:

## those who booked via a type of travel intermediary

	UK	Europe	Long haul
Booked accommodation with a travel intermediary	35%	68%	67%

	UK	Europe	Long haul
Booked transport to Scotland with a travel intermediary	14%	35%	45%

	UK	Europe	Long haul
(Those who booked in advance) Booked activities and experiences with a travel intermediary	8%	23%	45%

# UNDERSTANDING THE VISITOR JOURNEY

## UK VISITORS: SUMMARY

# 1. Key insights: UK Visitors (Planning)

**75%** of UK visitors started researching and planning within 6 months of travelling, rising to 82% for Scotland residents.

Scotland residents were more likely to plan within a month of travel (30%), compared to visitors from the rest of the UK (13%).

Solo travellers and those staying on short breaks were also more likely to start planning within a month of travel.

Those travelling with a family group, bigger travel groups (more than 5 people) or those who stayed longer (more than 7 nights in Scotland) tended to plan earlier.

On average UK visitors started to research and plan 19.7 weeks in advance.



## 2. Key insights: UK Visitors (Planning)

**74%** of UK visitors used a source(s) of information to help plan their trip in advance.

**25%** of UK visitors did not look for information to help plan their trip in advance. These visitors were more likely to be repeat visitors to Scotland and were also more likely to stay in one location only.

First time visitors were more likely to use a number of sources, including the VisitScotland website, transport providers, and OTAs (online travel agents) than repeat visitors.



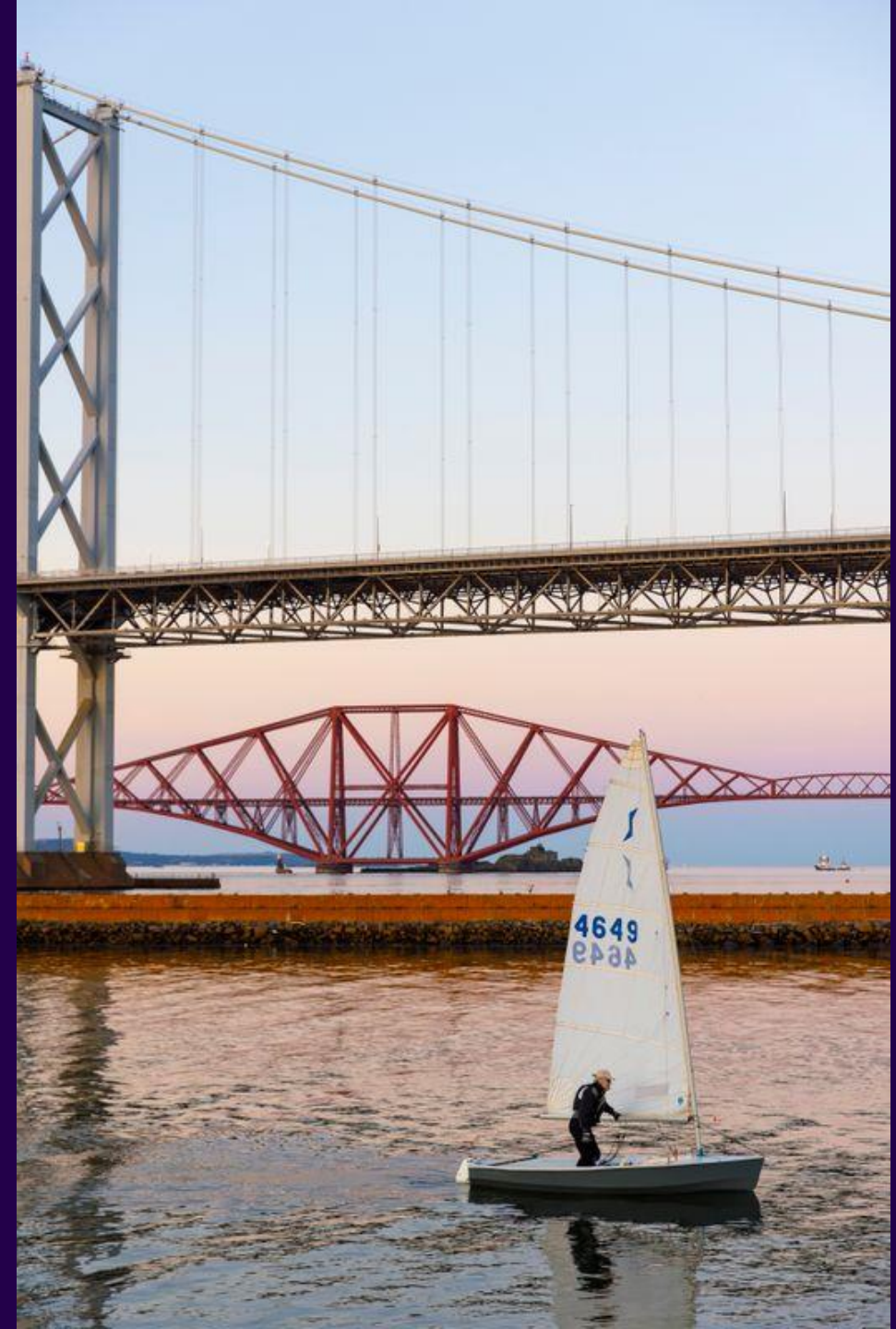
### 3. Key insights: UK Visitors (Booking)

**43%** of UK visitors reported that they booked their trip within 2 months of travel.

9% did not book in advance of their trip.

The planning of the trip and the actual booking tended to happen very close together, less than a 4-week gap.

On average UK visitors booked 16.3 weeks in advance.





## 4. Key insights: UK Visitors (Booking elements)

**64%** booked directly with providers.

### Accommodation

**1 in 3** used a type of intermediary for accommodation booking.

Due to the high proportion travelling by car, **49%** did not book travel in advance. 29% booked directly with a transport provider.

**29%** 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.

### Transport to Scotland (excluding Scotland residents)

### Activities & experiences



A close-up profile of a Highland cow with long, shaggy brown fur and large, curved horns. The cow is looking towards the right. The background is a lush green field with trees in the distance.

**UNDERSTANDING THE VISITOR JOURNEY**

**EUROPEAN VISITORS: SUMMARY**

# 1. Key insights: European Visitors (Planning)

**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.



## 2. Key insights: European Visitors (Planning)

**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%).



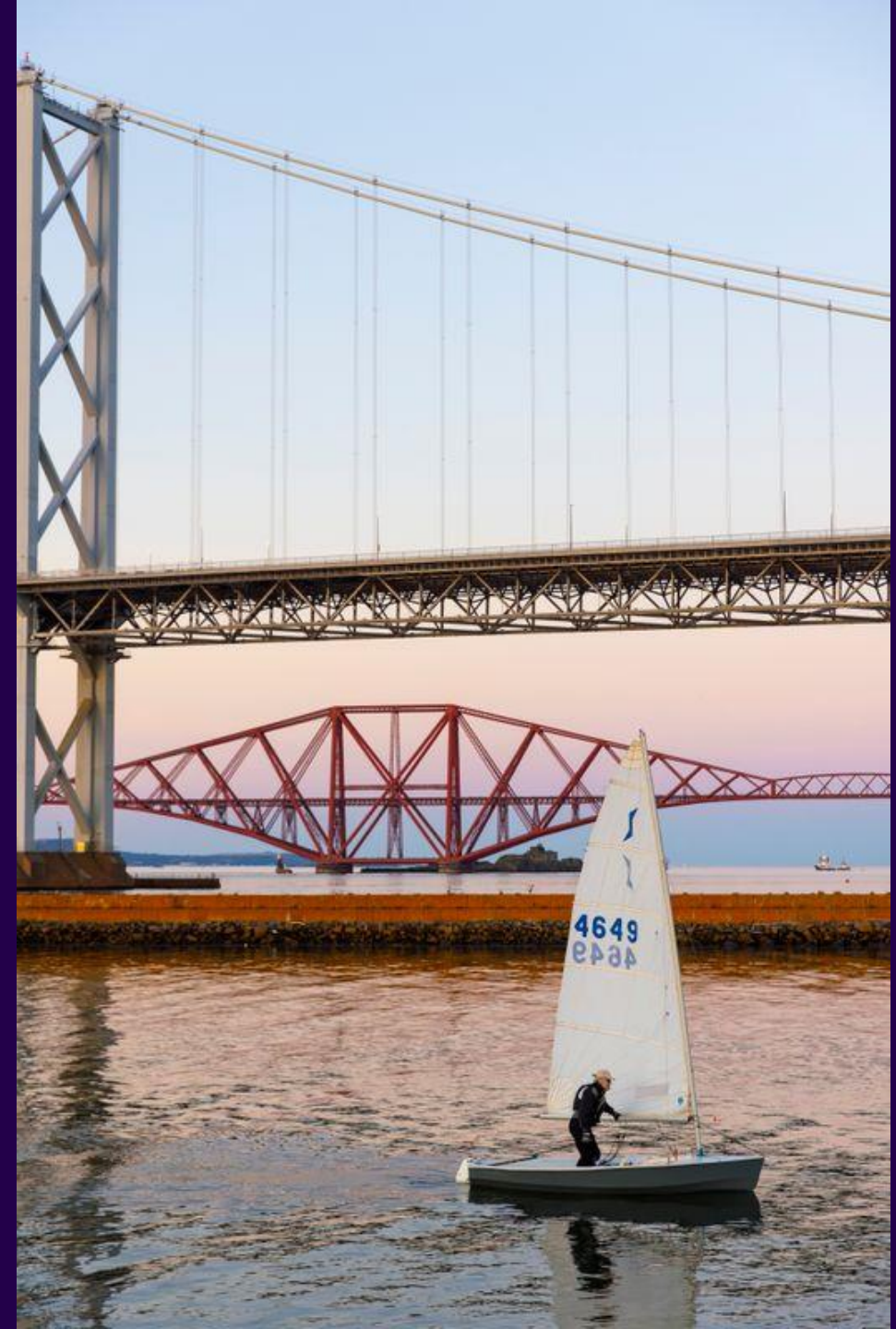
### 3. Key insights: European Visitors (Booking)

**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.



## 4. Key insights: European Visitors (Booking elements)

### Accommodation

**39%** booked directly with providers.

**68%** used a type of intermediary for accommodation booking.

### Transport to Scotland (excluding Scotland residents)

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

## LONG HAUL VISITORS: SUMMARY

# 1. Key insights: Long haul Visitors (Planning)

**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.





## 2. Key insights: Long haul Visitors (Planning)

**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.



### 3. Key insights: Long haul Visitors (Booking)

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

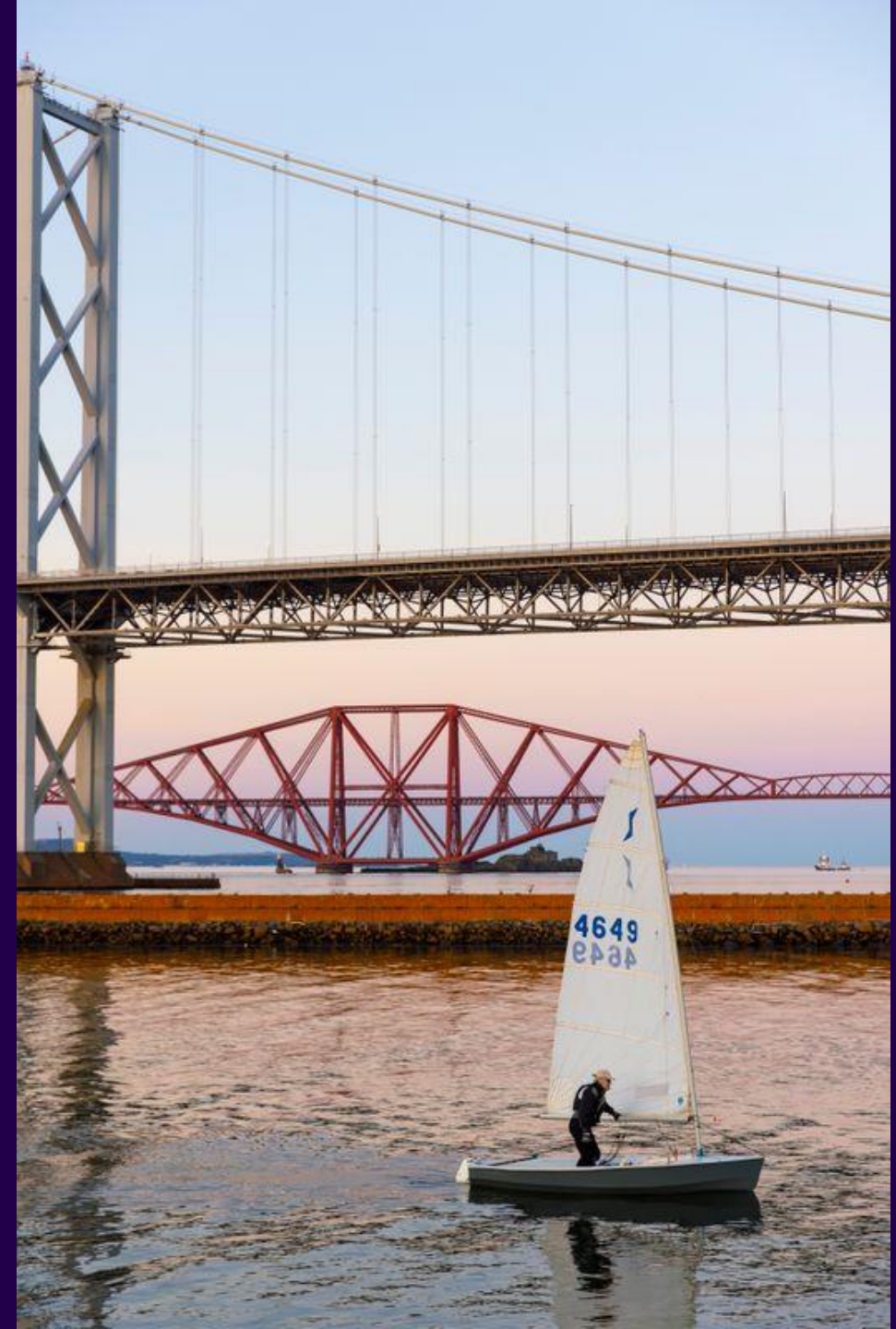
4% did not book in advance of their trip.

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.



## 4. 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 (excluding Scotland residents)

**67%** booked directly with a transport provider.

45% used a type of travel intermediary.

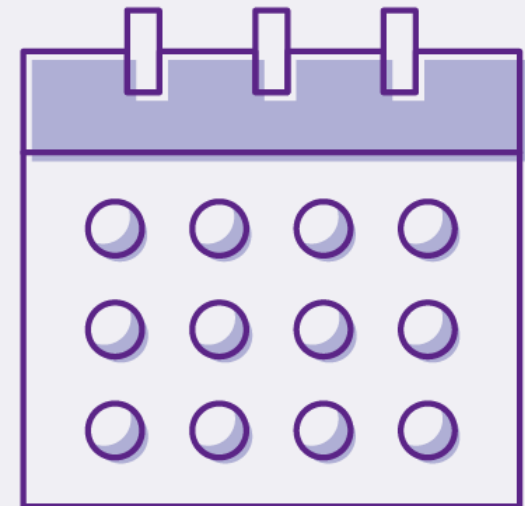
### Activities & experiences

**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.



# 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



## Disclaimer:

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.

## Contact Us:

Insight Department

[visitscotland.org](http://visitscotland.org)

[visitscotland.com](http://visitscotland.com)

[research@visitscotland.com](mailto:research@visitscotland.com)

Images © VisitScotland

August 2024