

# SCOTLAND VISITOR SURVEY 2023

## UNDERSTANDING THE VISITOR JOURNEY UK VISITORS (38 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

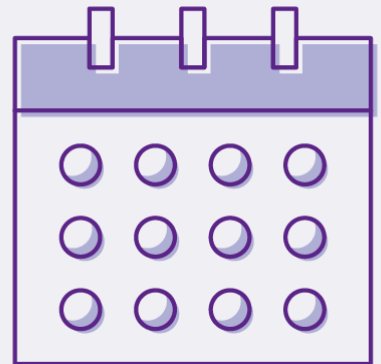
# Definitions used within this report

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

## UK VISITORS



## Key insights: UK Visitors Planning (1)

**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.



## Key insights: UK Visitors Planning(2)

**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.



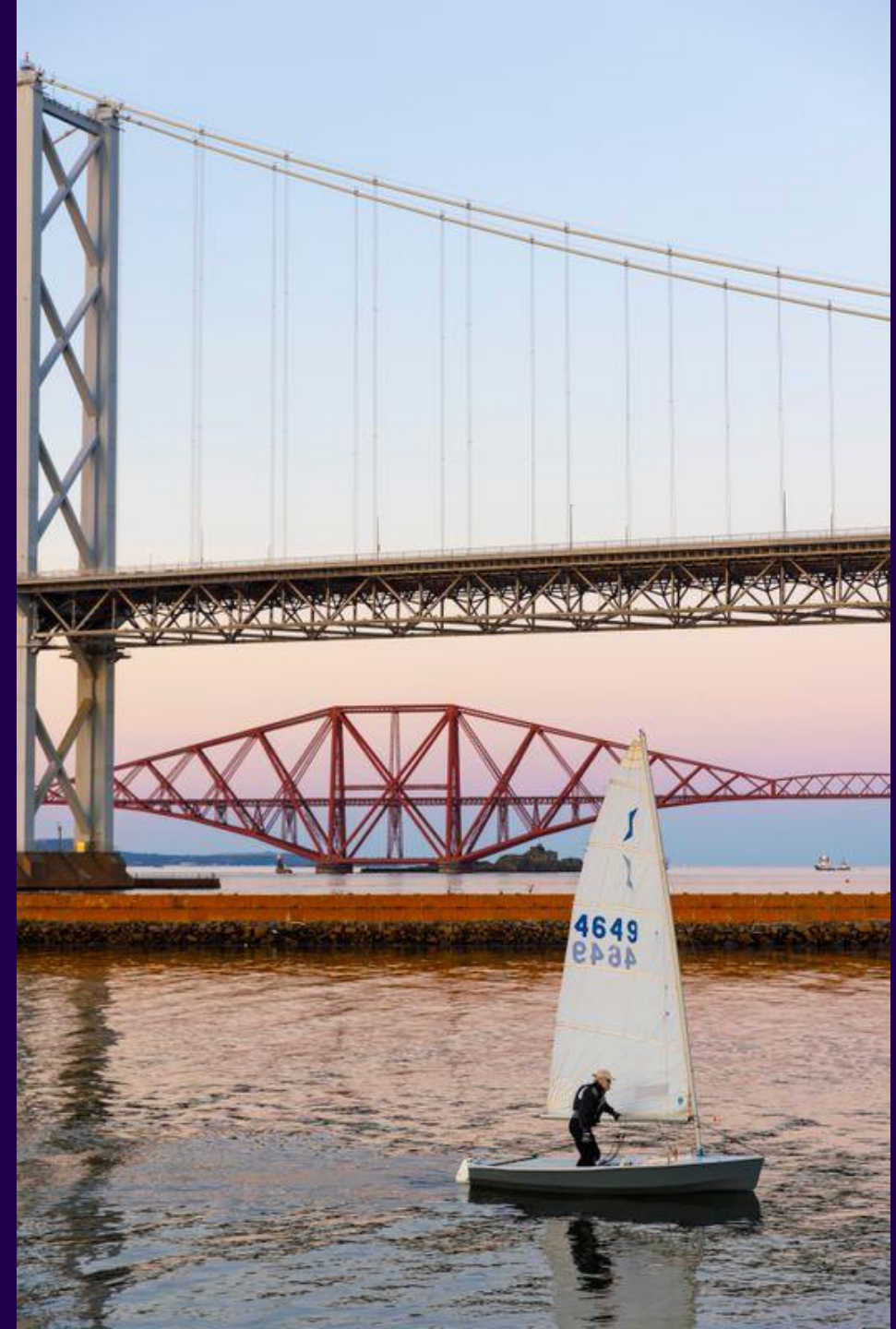
## Key insights: UK Visitors (Booking)

**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.



# 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



# UNDERSTANDING THE VISITOR JOURNEY

## UK VISITORS

### Detail

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

## 75%

of UK visitors started researching and planning their trip in Scotland within 6 months of travelling, with one third doing so 3 to 6 months in advance.

On average:

## 19.7 weeks

All UK visitors started planning their trip 19.7 weeks in advance of travel

## 21.2 weeks

Rest of UK visitors started planning their trip 21.2 weeks in advance

## 15.2 weeks

Scotland residents started planning their trip 15.2 weeks in advance



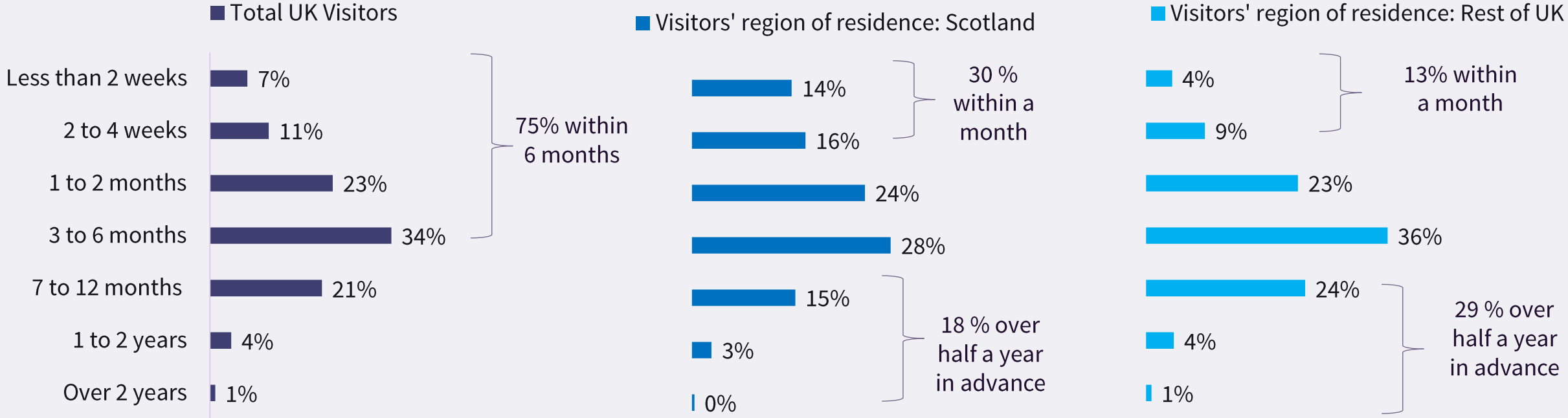
# 1.1 When did UK visitors start to plan their trip in Scotland: market summary



When started to plan trip	All UK visitors	Scotland residents	Rest of UK
Less than 2 weeks	7%	14%	4%
2 to 4 weeks	11%	16%	9%
<b>Subtotal: Within one month</b>	<b>18%</b>	<b>30%</b>	<b>13%</b>
1-2 months	23%	24%	23%
3-6 months	34%	28%	36%
<b>Subtotal: Less than 6 months</b>	<b>75%</b>	<b>82%</b>	<b>72%</b>
7-12 months	21%	15%	24%
1-2 years	4%	3%	4%
Over 2 years	1%	0%	1%
<b>Subtotal: More than 6 months</b>	<b>26%</b>	<b>18%</b>	<b>29%</b>



# 1.2 When did UK visitors start to plan their trip in Scotland: graphs



## 1.3 When did UK visitors start to plan their trip in Scotland:

### Additional analysis

Deep  
Dive

## Region of residence plays a greater role than knowledge about Scotland when it comes to planning time

- No significant differences between first time and repeat visitors regarding planning time. No major differences between those who claimed to have good knowledge about Scotland and those who said they knew little about Scotland.
- However, as stated previously, Scotland visitors were more spontaneous compared to those from the rest of UK.
- 30% were more likely to start the planning process within a month of travel compared to the Rest of UK visitors (13%). 18% of Scotland resident visitors started planning more than 6 months in advance compared to 29% for rest of UK visitors,

## 1.4 When did UK visitors start to plan their trip in Scotland:

### Additional analysis

Deep  
Dive

## The bigger the travel group, the earlier the planning process starts

- Those who were travelling with a family group (children or other family members) were more likely to plan earlier. 27% started planning more than 6 months in advance compared to those who didn't travel as a family group (19%).
- Amongst those who had more than 5 people in a travel party, only 3% planned within a month, and 41% of them started planning at least 6 months in advance.
- Solo travellers (27%) were more likely to start the planning process within a month of travel than any other traveller types.

## 1.5 When did UK visitors start to plan their trip in Scotland:

### Additional analysis

Deep  
Dive

### Those who stayed longer, tended to plan holidays earlier

- Amongst those who spent more than 7 nights in Scotland, 38% planned their trip at least 6 months in advance, and only 6% planned within a month.
- Whilst amongst those who spent 1-3 nights in Scotland, 34% planned their trips within a month prior to arrival, and only 11% said they started planning more than 6 months before the actual arrival date.

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

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

**74%**

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

**25%**

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

Those who did not look for information were more likely to be repeat visitors (93%).

They were also more likely to stay in one location (76%), rather than touring around Scotland or staying in multiple places.

One in 10 of them made a last-minute decision to take a trip in Scotland (planned the trip within 2 weeks).

**1%**

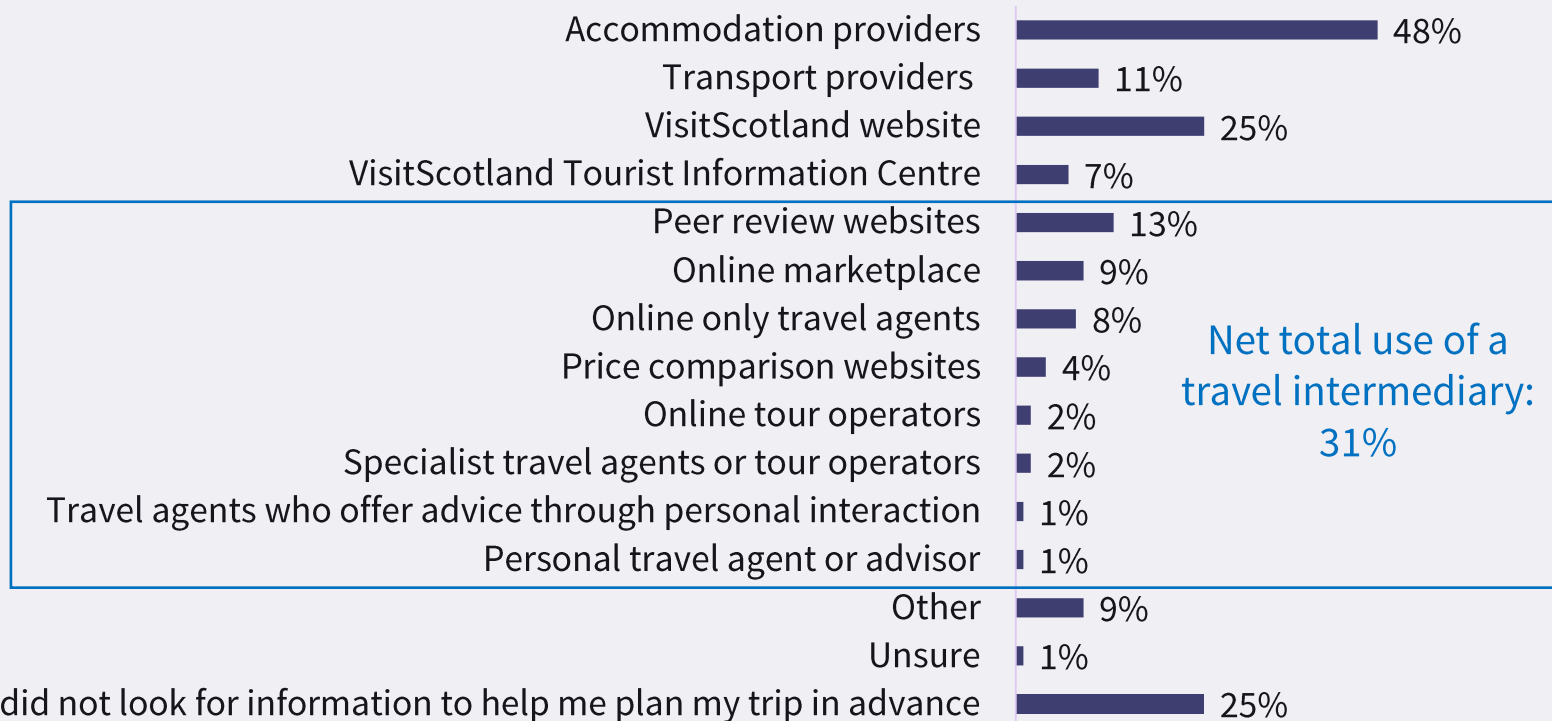
**Unsure**

## 2.1 Sources of information UK visitors used to plan: breakdown

Amongst the 74% of UK visitors who looked for information to research and plan their trip, a broad combination of resources were used. Accommodation providers and the VisitScotland website were mentioned more often than other sources. 31% used a type of travel intermediary to research and plan their trip.



Base (all UK visitors): 1,531



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

### Additional analysis

Deep Dive

#### By region of residence:

- Visitors living in the rest of the UK (outside Scotland) were more likely than those from Scotland to mention the VisitScotland website (27% vs 17%), peer review websites (15% vs 8%), and online marketplaces (10% vs 5%).
- Accommodation providers' website were used by both Scotland resident visitors and the rest of UK visitors (50% vs 47%)

#### By life stage:

- Pre-nesters were the most likely to mention using price comparison websites (18%), online travel agents (17%) and online tour operators (7%).
- Pre-nesters (22%) together with families (21%) more often mentioned peer review websites than older independents (14%) and retirement age visitors (8%).

#### By age group:

- In correlation with life stage, price comparison websites were used more amongst visitors under 34 compared to those 55 + ( 17% vs 2%).

## 2.3 What sources of information did UK visitors use to research and plan trip?

### Additional analysis

Deep  
Dive

#### By previous experience in Scotland:

- First time visitors were more likely to use a number of sources, including the VisitScotland website (32%, vs 24% repeat); transport providers (19%, vs 10% repeat) and online travel agents (18%, vs 7% repeat).

#### By knowledge level of Scotland prior to visit:

- Peer review websites were used more by those who claimed to have less knowledge about Scotland compared to those who are more familiar with Scotland (16%). vs 10%

#### By type of holiday:

- Those who toured around Scotland staying in 2 or more places, averagely used more sources of information in the research and planning stage.



### 3. When did UK visitors book their trip to Scotland?

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

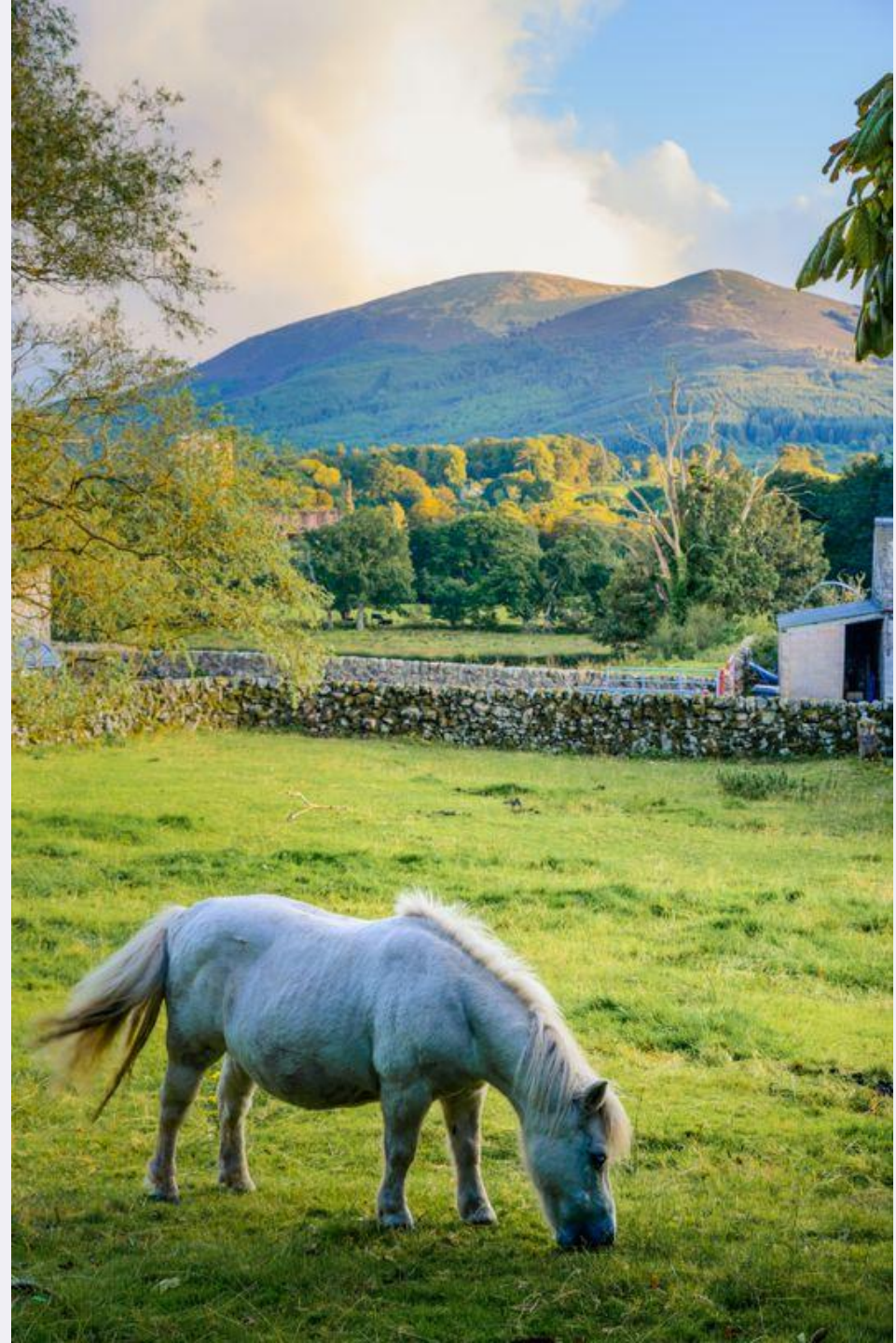
**9%** did not book in advance

**16.3 weeks**

of those who booked in advance, on average, they booked their trip 16.3 weeks before travel.

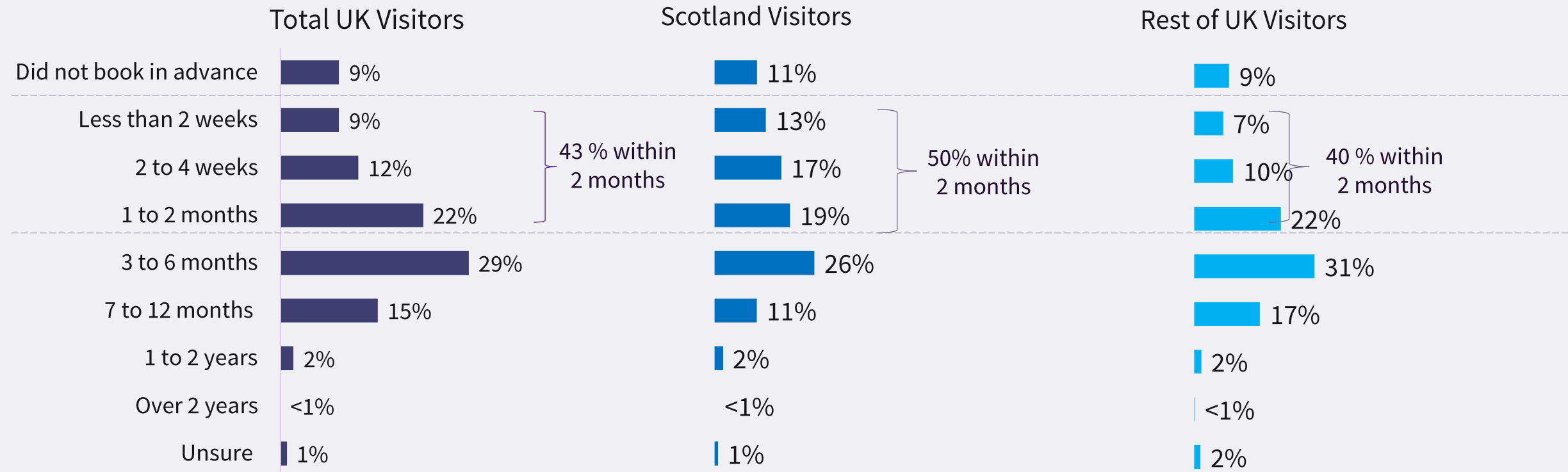
Base (all UK visitors): 1,531

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



# 3.1 When did UK visitors book their trip to Scotland: graphs






Over 40% of UK visitors reported that they booked their trip within 2 months of travel, with almost one in ten travelling without a booking. Of those who booked in advance, on average, they booked their trip 16.3 weeks before travel.



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

The planning and booking timeframe are very close together for UK visitors. On average, UK visitors started planning their trip 19.7 weeks in advance of travel and booked 16.3 weeks in advance (less than a 4-week gap).

Those who started planning earlier are also likely to book earlier with 65% of those who started planning their holiday between 7 and 12 months in advance, also booking their trip around 7 and 12 months in advance.

When started planning the trip	When bookings were made
less than 4 weeks 	25% didn't book in advance, 71% booked less than 4 weeks prior to arrival.
1 to 2 months 	64% booked 1 to 2 months in advance.
3 to 6 months 	68% booked 3 to 6 months in advance.
7 to 12 months 	65% booked 7 to 12 months in advance.
Over a year in advance 	46% booked over a year in advance, and 31% booked between 7 and 12 months .

## 4. How did UK visitors book their accommodation in Scotland

64%

Booked directly through the accommodation provider

5% did not book accommodation in advance

**15%** Booked accommodation via an online only travel agent (e.g. Booking.com, Expedia).

**14%** Booked accommodation via an online marketplace (e.g., Airbnb, VRBO).

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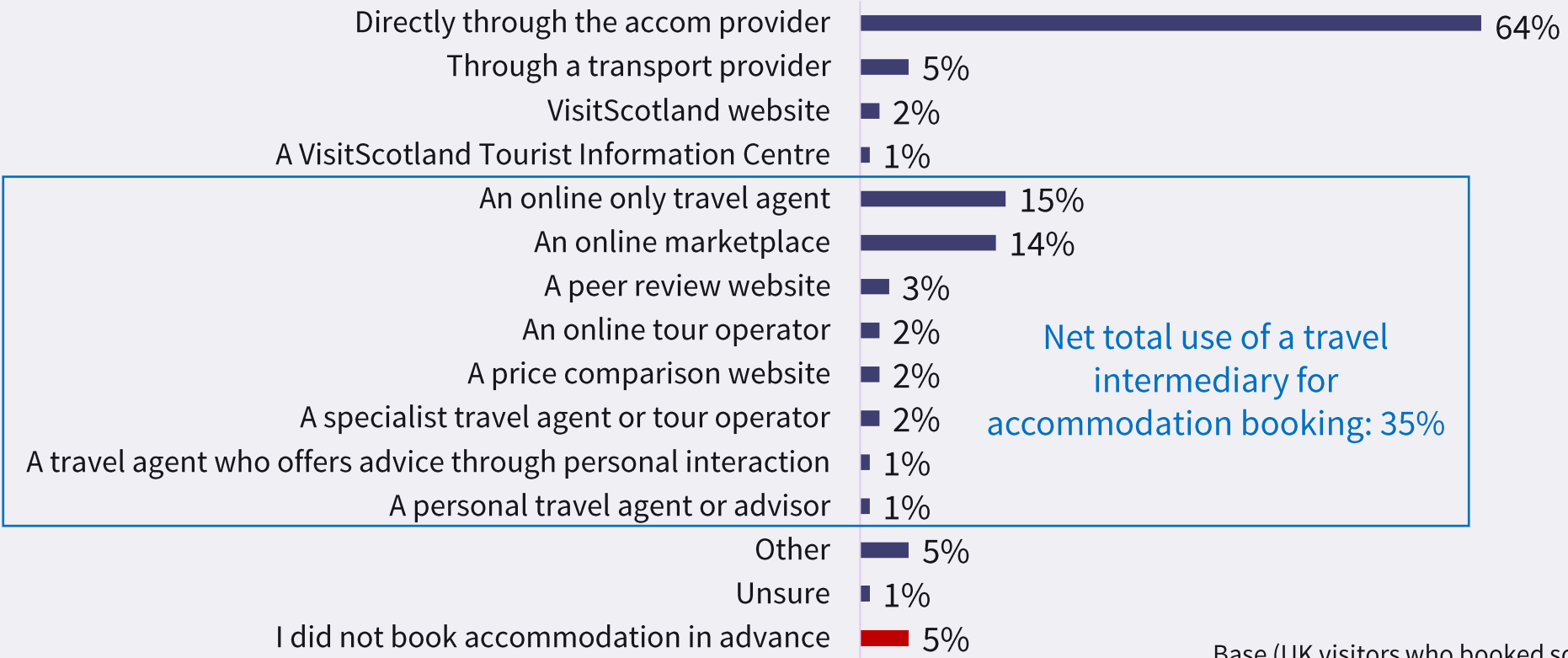
**35%** Net total use of a travel intermediary for accommodation booking.

VisitScotland's resources were more popular in the holiday research stage and less so at the actual booking stage.

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

Direct booking with the accommodation provider was mostly mentioned (64%); online travel agents and online marketplaces were the most cited travel intermediaries by UK visitors. In total, 1 in 3 used a type of intermediary for accommodation booking.

VisitScotland’s resources seemed to be more popular in the holiday research stage and less so at the actual booking stage.



Base (UK visitors who booked some of trip in advance): 1,394



Q11 (Stage 2): And, which of the following methods did you use to book your accommodation for your trip? Note: this question is a multiple-choice question, therefore respondents may have selected multiple channels, leading to the total percentage exceeding 100%.

## 4.2 How UK visitors booked their accommodation:

### Additional analysis

Deep Dive

#### By region of residence:

- Visitors from Scotland were more likely to mention booking directly with the accommodation provider (69%) than those from the rest of the UK (62%).
- Rest of UK visitors were more likely to book through an online travel agent (17% compared to Scotland residents 10%) or an online marketplace (15% compared to Scotland residents 11%).

#### By previous travel experience in Scotland:

- Repeat visitors were more likely to book directly with the accommodation provider (65%) than first time visitors (52%).
- Higher proportions of first timers mentioned online travel agents (28% first timers compared to 14% repeat) and online marketplaces (23% first timers compared to 13% repeat).

#### By life stage:

- Pre-nesters (27%) were more likely to use an online marketplace than other life stage groups. Families (66%) and couples (69%) were more likely to book directly with the provider than solo travellers (45%) and friendship groups (57%).

## 5. How did UK visitors book their travel to Scotland

49%

Did not book transport in advance

- 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 to Scotland in advance .
- 29% booked directly with transport providers.
- The net total who used a travel intermediary was 14%.

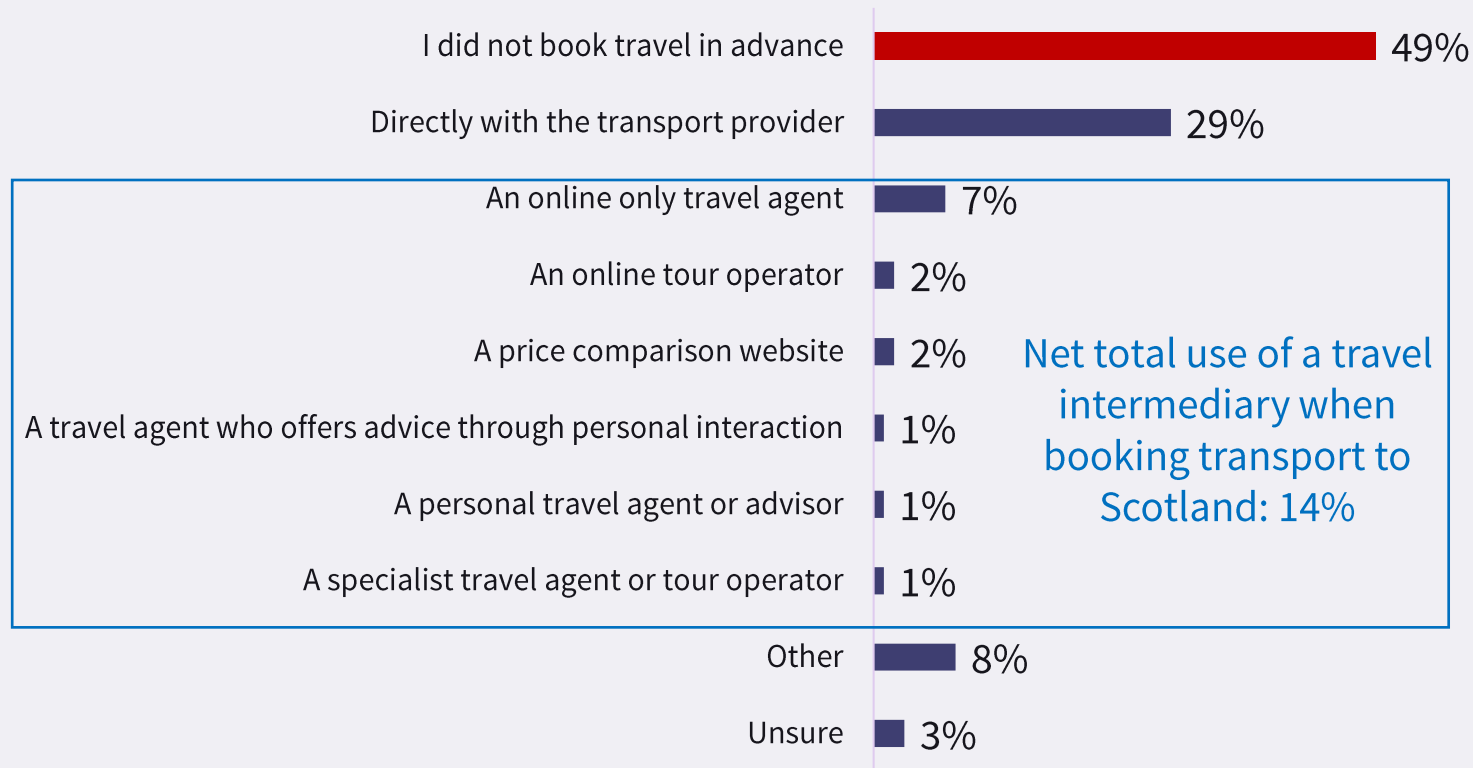


# 5.1 Breakdown of sources used by UK visitors to book their travel to Scotland



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 online travel agents (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).



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

29%

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

Of those that did book in advance,

89%

booked directly through the providers website

The main reasons for not booking in advance were:

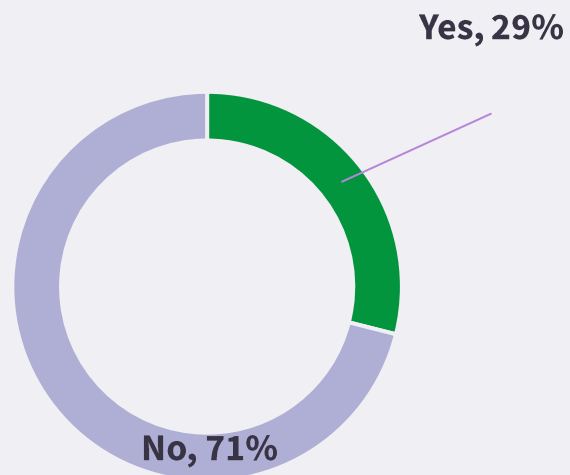
- activities did not need to be booked
- visitors wanted to wait until they were on the trip to book

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

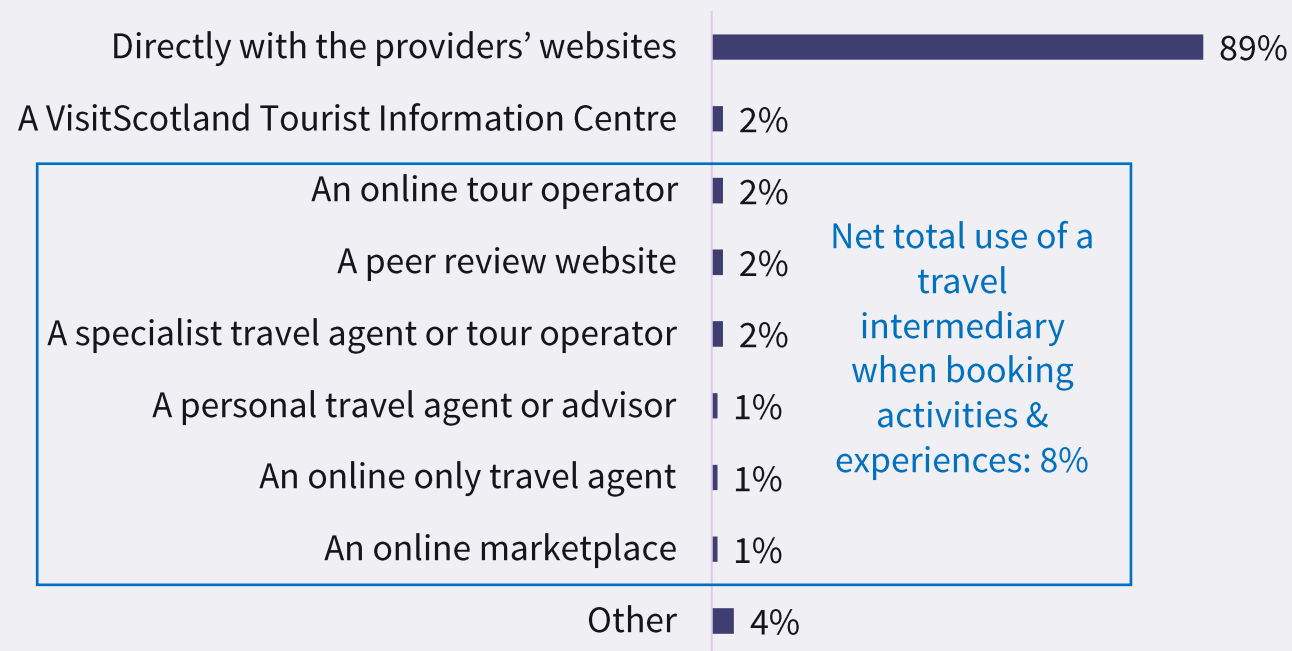
Only 29% of UK visitors booked their activities and experiences in advance of their trip in Scotland. Amongst those who booked in advance, the vast majority did so directly with the activity or experience providers; 8% used a type of intermediary.

The main reasons for not booking in advance were: activities did not need to be booked (53%) and visitors wanting to wait until they were on the trip to book (39%).

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



## Booked activities and experiences in advance



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

Note: Q15 is a multiple-choice question, therefore respondents may have selected multiple channels, leading to the total percentage exceeding 100%.

## 6.2 How UK visitors booked activities and experiences:

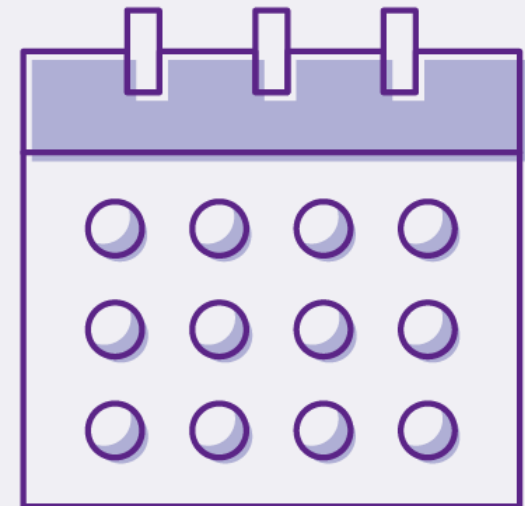
### Additional analysis

Deep Dive

- First time visitors (41%) are more likely to book their activities in advance compared to repeat visitors (27%).
- Those who travelled with their pets are less likely to book activities in advance (31% vs 16% travelled without pets).
- Those who are visiting family and friends (VFR) are less likely to book activities in advance (19%) compared to those purely on leisure holidays (30%).
- Rest of UK visitors (30%) compared to Scotland resident visitors (25%).
- Pre-nesters (36%) and families (37%), compared to older independents (27%) and retirement age (28%).

# 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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## Contact Us:

Insight Department

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

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

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

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