

SPOTLIGHT ON OUR US VISITORS TO SCOTLAND

SOURCE: SCOTLAND VISITOR SURVEY

Spotlight on the US visitor to Scotland (1)

32% repeat visitors
(of which 3% take trips in Scotland regularly)



68% first time visitors

52% over age 55

12% aged 25 to 34

4% under 24

80% toured Scotland staying in 2 or more places



15% stayed in one urban, city or town location

62% were in employment
32% were retired

25% were on a trip of a lifetime



60% were on holiday as a couple

8% were travelling solo

11% travelled with child/children

17% with friend(s)

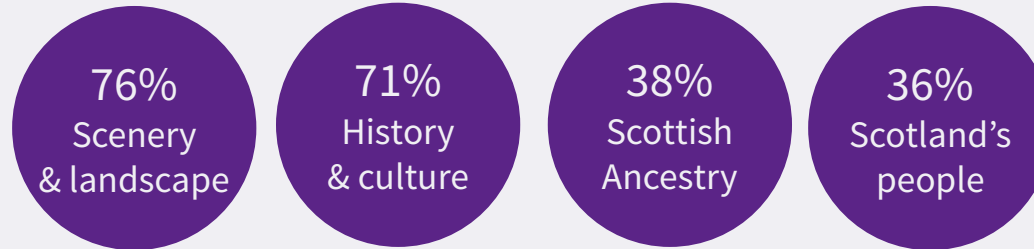


Spotlight on the US visitor to Scotland (2)

Scotland's scenery and landscape, history and culture were strong drivers for US market.

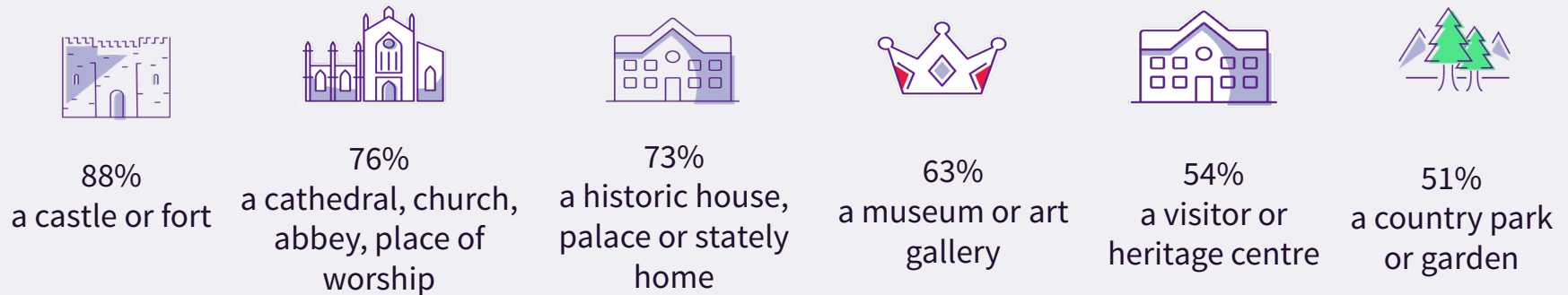
Scottish ancestry and Scotland's reputation for friendly people also stand out as main reasons for choosing Scotland.

Top motivations for visiting Scotland

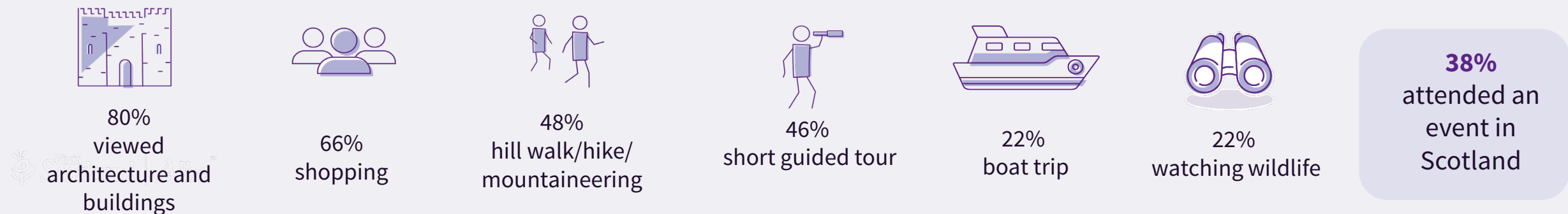


65% took part in a food and drink experience

Key attractions visited



Top activities undertaken



The visitor journey: US visitors to Scotland

Inspiration



Planning



Booking



Getting to Scotland



Trips in Scotland



Post trip



Sources of inspiration

60% personal recommendations

56% digital information

39% film, TV or books featuring Scotland

(net figures)



Started planning 43.7 weeks in advance prior to arrival

Sources used to plan

36% VisitScotland's website

42% accommodation providers

28% transport providers

70% travel intermediaries (net)

Started booking 26.3 weeks in advance

Accommodation:

58% booked directly with providers

64% booked via travel intermediaries

Transport to Scotland:

71% booked directly with providers

44% via travel intermediaries

Paid Activities:

68% booked in advance

Transport used to travel to Scotland from US

88% by plane:
37% direct
52% indirect

18% public transport (ferry, coach, train)

8% by car (From other parts of UK, Ireland or Europe)

Accommodation used

78% hotel, motel or inn

28% B&B/GH

29% self-catering

3% Caravan, camping or glamping

Net serviced accom:

84%

Net non serviced accom

41%

85% rated their trip 9 or 10 out of 10

88% are likely to recommend Scotland (9 or 10 out of 10)

47% are quite or very likely to return in the next 5 years

1. US visitor profile

The age profile of US visitors tends to be older. **45%** were in the 55 to 74 age group. This figure is similar to the Canadian market (44% in the 55 to 74 age band) but lower than the Australian market (61%).

Almost a third were retired.

62% of US visitors were employed, a higher proportion of visitors in work compared to other long-haul markets, Canada (55%) and Australia (53%).

5% of US respondents reported having a long-term health condition, disability, or infirmity, which is higher than the European average but lower than the long-haul average.

60% of US visitors were on holiday as a couple. **20%** travelled with other members in their family; traveling with friends ranks as the third most common way to visit Scotland (17%).

2. US visitor and trip profile

68% of visitors from the US reported that they were first-time visitors to Scotland, which is higher than the figures for Canada (54%) and Australia (48%) and significantly higher than the global average (25%).

A quarter of US visitors reported that their trip to Scotland was “a trip of a lifetime.”

A third stated that they were in Scotland to celebrate a special occasion (35%), which is significantly higher compared to visitors from Europe and the UK market.

80% reported touring multiple locations, staying in two or more destinations during their trip - a figure significantly higher than the global average (49%).

Summary



3. Holiday motivations and reasons for choosing Scotland

Scotland's scenery and landscape, history, and culture remain important motivations for visits, followed by Scottish ancestry and Scotland's reputation for friendly and welcoming people.

Personal recommendations were the most influential source of inspiration for visitors from the US (60%), followed by digital resources (56%). Nearly a quarter of US visitors mentioned a printed source.

39% stated that they were inspired by film, TV, or literature featuring Scotland, which is higher than the global average (19%).

Summary



4. Holiday planning and booking

On average, visitors from the US started planning their holiday or short break to Scotland 43.7 weeks in advance and booked their trip 26.3 weeks prior to arrival. Both the planning and booking lead times are similar to other long-haul markets and significantly longer than those of the European and UK markets.

Of those visitors who researched and planned their trips, over a third mentioned using the VisitScotland website (36%). **70%** used some type of travel intermediary for holiday planning. This figure is similar to Canada (68%) and Australia (63%) and **significantly higher than** the European and UK markets.

Travel intermediaries play a significant role in accommodation booking with 64% citing their use. 70% US visitors booked their travel to Scotland directly with the transport provider. 68% US visitors booked paid activities/experiences prior to arrival, higher than Canada (63%) and Australia (50%). Of those that did book in advance, 45% booked via intermediaries.

Summary



5. Transport and accommodation

88% of US visitors travelled to Scotland by plane (over a third via direct flight to Scotland from USA).

18% travelled by public transport (ferry, coach, train) from other parts of UK, Ireland or Europe.

64% used public transport when touring around Scotland (public bus, ferry, train, or tram within areas visited). Travelling by car was also popular (60%).

78% of US visitors stayed in a hotel during their trip, while 28% stayed in a guest house or B & B, followed by self-catering accommodation (29%) and someone's private home (15%).

Overall, serviced accommodation (84%) was much more popular than non-serviced accommodation (41%), though it's possible that both types were used on the same trip, depending on the regions where visitors stayed overnight (if they had overnight stays in more than one region).

Summary



6. Activities, events, attractions, food and drink

When it comes to things to see and do, nearly all US visitors to Scotland engaged in a range of experiences during their trip:

99% of US visitors to Scotland visited at least one type of attraction

97% of US visitors participated in at least one type of activity

65% of US visitors took part in at least one food and drink experience

38% of US visitors participated in at least one type of event

Summary



7. Holiday satisfaction and likelihood to return

63% of US visitors rated their holiday in Scotland as a perfect 10 out of 10 experience.

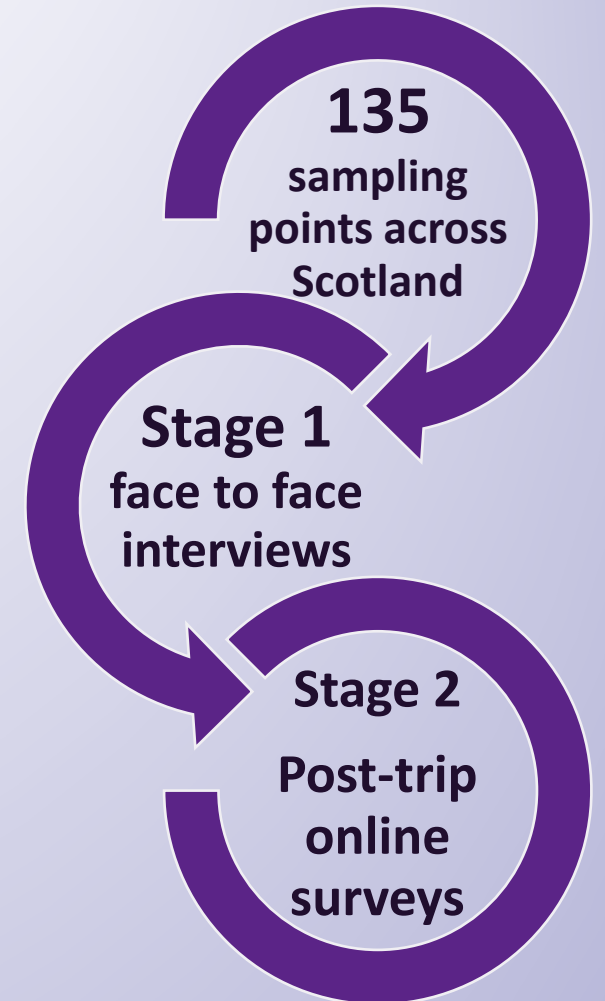
88% of US visitors are likely to recommend Scotland (9 or 10 out of 10).

47% of US visitors are quite or very likely to return to Scotland in the next five years.



Scotland Visitor Survey: 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.
- Sample sizes for visitors from US (leisure overnight visitors only):
First stage face to face survey sample for visitors from US: n=1626
Second stage follow-up online survey sample for. US: n=487
- Please note the data for individual European countries is unweighted.



1. Definitions used

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.

2. Definitions used (cont)

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

3. Accommodation definitions

Serviced accommodation:

Hotel/Motel/Inn

Guest House/B&B

Restaurant with rooms

Serviced Apartment

Non serviced accommodation:

Self catering accommodation (whole of property or unit)

Friend's or relatives homes

Rental of private home (room only)

Second home or time share

Caravan, camping and glamping

Private home:

Staying with friends/relatives

Rental of a room in someone's private home

Second home

Caravan, camping and glamping:

Campervan or motorhome

Camping (campsite or wild)

Touring or Static Caravan

Glamping or alternative accommodation

All 'other' accommodation types are not included in the above nets i.e. hostel, farmhouse, other.



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