

SCOTLAND VISITOR SURVEY 2015 & 2016

Introduction

The Scotland Visitor Survey was carried out by Jump Research for VisitScotland to enhance understanding of visitor behaviour and the visitor experience in Scotland. 11,743 leisure overnight visitors were interviewed in Scotland between May and September 2015 and 2016. 2,999 responded to a follow-up online survey on their return home. **753** visitors were interviewed in The Highlands of Scotland and **975** visitors answered specific questions about their visit to the area via the follow-up online survey. *(The higher figure is due to people being interviewed face-to-face in other regions of Scotland and indicating in the online survey that they had stayed overnight in The Highlands of Scotland).*



The Glenfinnan Viaduct, the West Highland Line in Glenfinnan, The Highlands.

Volume and Value

The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region. To provide this wider context and to provide an overview of tourism to the area, the following data is sourced from the 2015 GB Tourism Survey and International Passenger Survey (latest available at time of publication). These figures are for the full year Jan-Dec 2015:

The Highlands of Scotland (2015)

2,259,000 overnight visits

78% domestic visits

22% overseas visits

Top overseas markets: **USA, Germany, France, Australia, Spain**

£706m total visitor spend



What attracted visitors to come...

The Highlands of Scotland (top 10)

| | Base | 975 |
|----|--|-----|
| 1 | The scenery & landscape | 87% |
| 2 | A place I have always wanted to visit | 58% |
| 3 | The history & culture | 55% |
| 4 | To get away from it all | 37% |
| 5 | Holidayed here before and wanted to return | 36% |
| 6 | To visit a particular attraction | 31% |
| 7 | The range of activities available | 27% |
| 8 | Its reputation for friendly people | 26% |
| 9 | To visit cities | 22% |
| 10 | To visit family / friends who live there | 16% |

Scotland (top 10)

| | Base | 11743 |
|----|--|-------|
| 1 | The scenery & landscape | 50% |
| 2 | The history & culture | 33% |
| 3 | Holidayed here before and wanted to return | 24% |
| 4 | To get away from it all | 23% |
| 5 | To visit family / friends who live there | 20% |
| 6 | It is easy to get to | 16% |
| 7 | Closeness to home | 15% |
| 8 | Its reputation for friendly people | 15% |
| 9 | To visit cities | 15% |
| 10 | A place I have always wanted to visit | 15% |

Scenery and landscape was a major attraction for visitors to The Highlands of Scotland, more so than to almost any other part of Scotland.

More than half of visitors to the area said they had always wanted to visit (an important driver for this region), whilst a similar proportion mentioned the history and culture of The Highlands of Scotland as a particular draw.

Getting away from it all was a motivation for just under two-fifths, as was the familiarity of having visited before and wanting to return.



Activities undertaken

The Highlands of Scotland (top 10)

| | Base | 972 |
|----|--|-----|
| 1 | Sightseeing by car / coach / on foot | 81% |
| 2 | Visited a historic house, stately home, castle | 65% |
| 3 | Short walk, stroll | 59% |
| 4 | Visited a cathedral, church, abbey, other religious building | 50% |
| 5 | Long walk, hike, ramble | 48% |
| 6 | Visited a beach | 45% |
| 7 | Visited cities | 42% |
| 8 | Centre based walking | 41% |
| 9 | Shopping | 39% |
| 10 | Visited a visitor / heritage centre | 37% |

Scotland (top 10)

| | Base | 2999 |
|----|--|------|
| 1 | Sightseeing by car / coach / on foot | 74% |
| 2 | Visited a historic house, stately home, castle | 60% |
| 3 | Short walk / stroll | 54% |
| 4 | Shopping | 46% |
| 5 | Visited a cathedral, church, abbey, other religious building | 46% |
| 6 | Visited a museum / art gallery | 45% |
| 7 | Centre based walking | 45% |
| 8 | Visited a country park / garden | 43% |
| 9 | Visited cities | 42% |
| 10 | Long walk, hike, ramble | 38% |

8 in every 10 visitors to The Highlands of Scotland undertook some form of sightseeing either on foot or by car or coach, making this the most popular activity in the area. Just under a fifth (18%) mentioned having taken a guided tour.

Walking was also important with 59% of visitors saying they took a short walk or stroll and 48% having taken a longer walk, ramble or hike.

Just under two-thirds visited a historic house, stately home or castle in The Highlands of Scotland whilst half visited a cathedral or church.



Type of accommodation stayed in

The Highlands of Scotland (top 5)

| | Base | 975 |
|---|---|-----|
| 1 | Hotel | 40% |
| 2 | B&B / Guest House / Restaurant with Rooms | 40% |
| 3 | Self-catering | 20% |
| 4 | Camping | 13% |
| 5 | Friends / family | 10% |

Scotland (top 5)

| | Base | 2999 |
|---|---|------|
| 1 | Hotel | 41% |
| 2 | Self-catering | 22% |
| 3 | B&B / Guest House / Restaurant with Rooms | 20% |
| 4 | Friends / family | 19% |
| 5 | Camping | 6% |

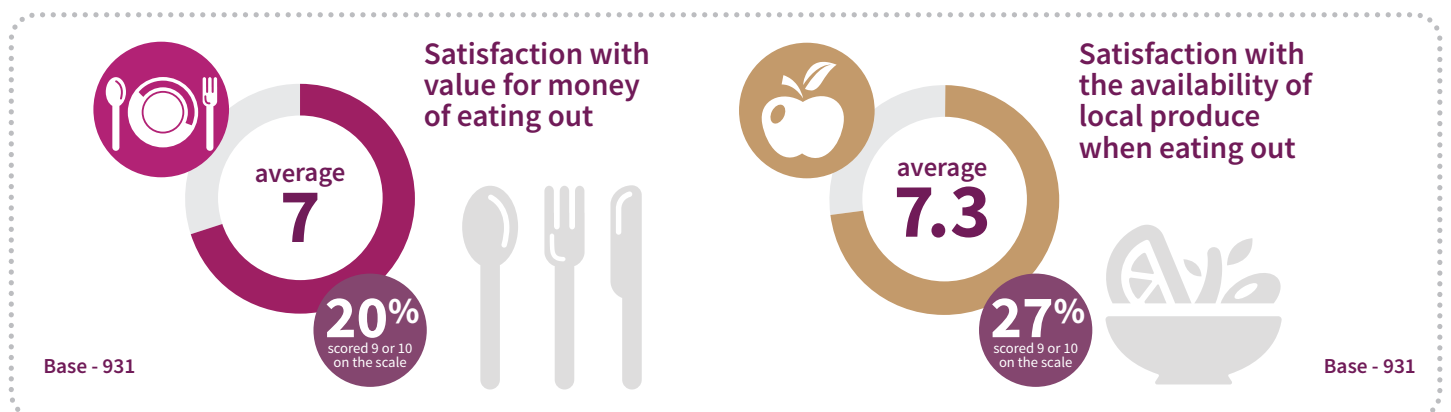
Serviced accommodation dominated for visitors to The Highlands of Scotland with 40% staying in hotels and 40% in B&Bs, guest houses or restaurants with rooms. In fact, the proportion of visitors staying in B&B / guest house accommodation was higher in this area than anywhere else in Scotland.

Other types of accommodation that were more popular in The Highlands of Scotland than on average were camping (13%), hostels (9%) and Airbnb (8%).

Visitors were asked to rate various aspects of their visitor experience in The Highlands of Scotland on a scale of 1 to 10 (with 1 being extremely dissatisfied through to 10 as extremely satisfied).

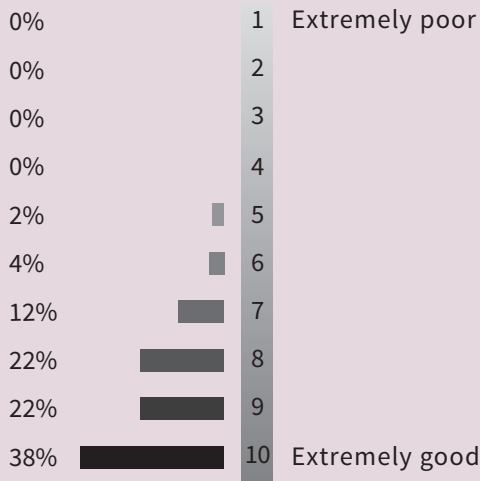
Staff service and knowledge about things to do in the local area were the highest rated accommodation measures in The Highlands of Scotland. Lower satisfaction was recorded for free Wi-Fi being available at visitor accommodation.

8 in 10 visitors thought the area was easy to travel around, and value for money of attractions in The Highlands of Scotland was also endorsed by visitors with an average score of 7.9. Slightly lower scores were recorded for the availability of local produce and value for money of eating out, consistent with other Scottish regions.

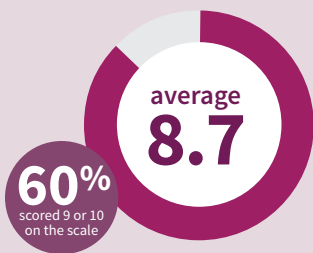
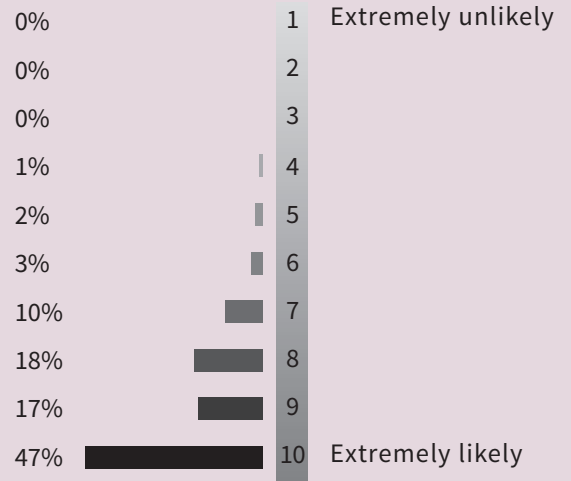




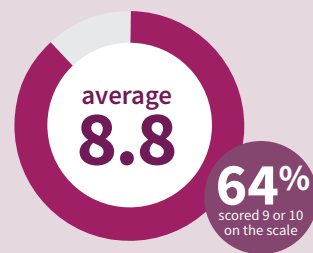
Your overall experience?



How likely are you to recommend?



Base - 975



Base - 975

Visitors rated their experience of staying in The Highlands of Scotland highly with 94% giving a score of 7 or more out of 10. Three-fifths of visitors to the area gave scores of 9 or 10 out of 10, indicating the highest levels of satisfaction with their trip. These top 2 scores (9 or 10) show genuine satisfaction and can foster loyalty. The challenge is to continue to improve the visitor experience to encourage more visitors to select these highest scores on the satisfaction scale.

High levels of satisfaction with the visitor experience translated into a high propensity to recommend The Highlands of Scotland as a holiday destination to friends and family, with 92% giving a 7-10 score. 64% scored 9 or 10 on the recommendation scale, declaring a strong level of intention to recommend the area.

Appendix Using and interpreting the Scotland Visitor Survey

- **The Scotland Visitor Survey should not be viewed in isolation**
- The survey collates views on a wide range of topics to understand visitor attitudes and behaviours. This data supplements data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level by:
 - The Great Britain Tourism Survey (GBTS) which estimates the volume and value of domestic tourism - from within Scotland and the rest of Great Britain
 - The International Passenger Survey (IPS) which provides details of tourism from abroad
- For further information and notes on this data please see the Tourism in Scotland and Tourism in Scotland's Regions fact sheets available within the Research & Statistics section of our corporate website http://www.visitscotland.org/research_and_statistics.aspx
- The Scotland Visitor Survey is undertaken during the main season only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Scotland between May and September 2015 and 2016 only.
- The sample comprises leisure overnight visitors only, and as such the following are excluded: visitors on a day trip from home, those on a business trip, cruise ship visitors.
- The base size refers to the unweighted base.