

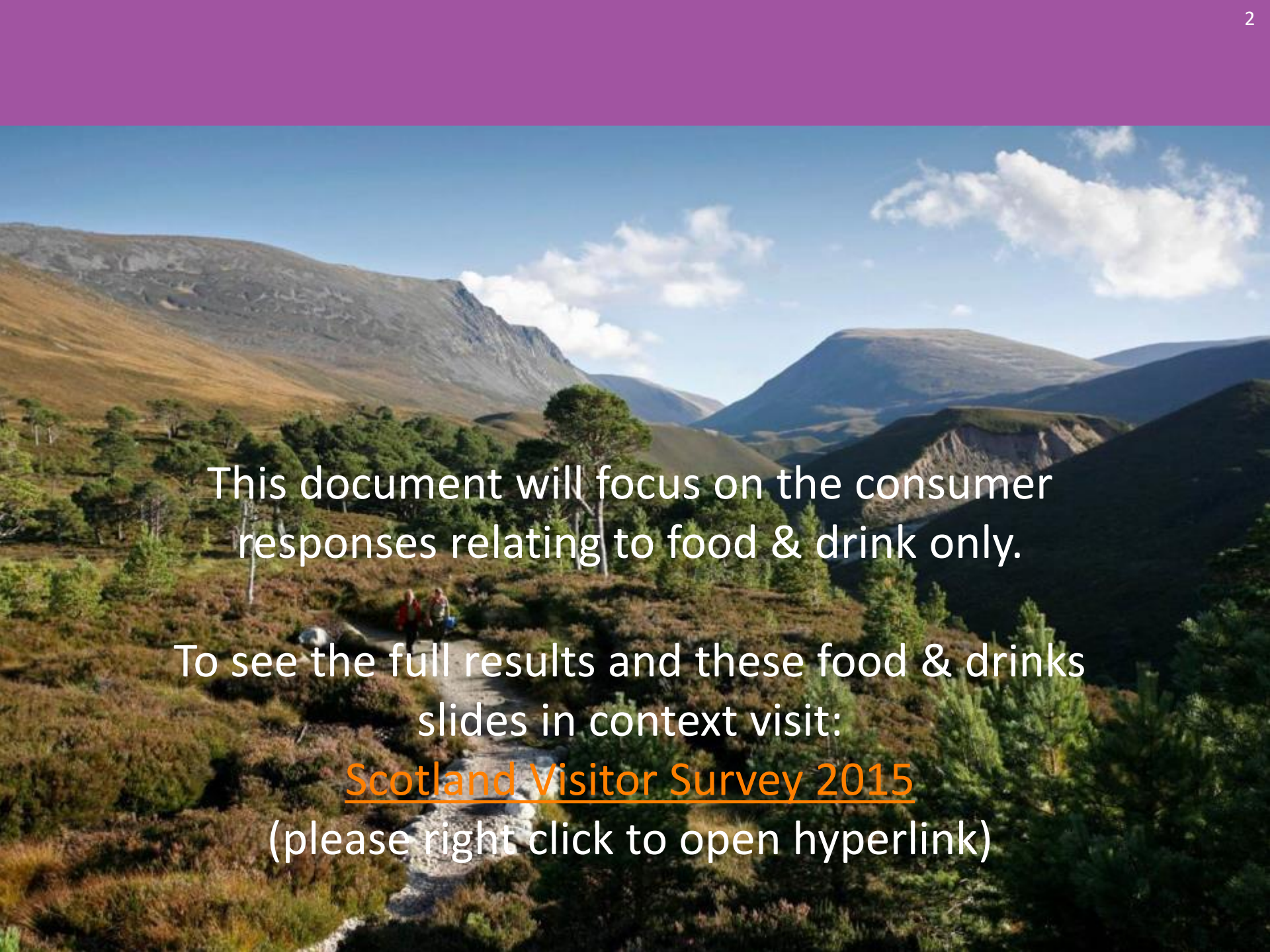


Scotland Visitor Survey 2015

Extract on Food and Drink

Two Year Survey - Year One Results





This document will focus on the consumer responses relating to food & drink only.

To see the full results and these food & drinks slides in context visit:

[Scotland Visitor Survey 2015](#)

(please right click to open hyperlink)

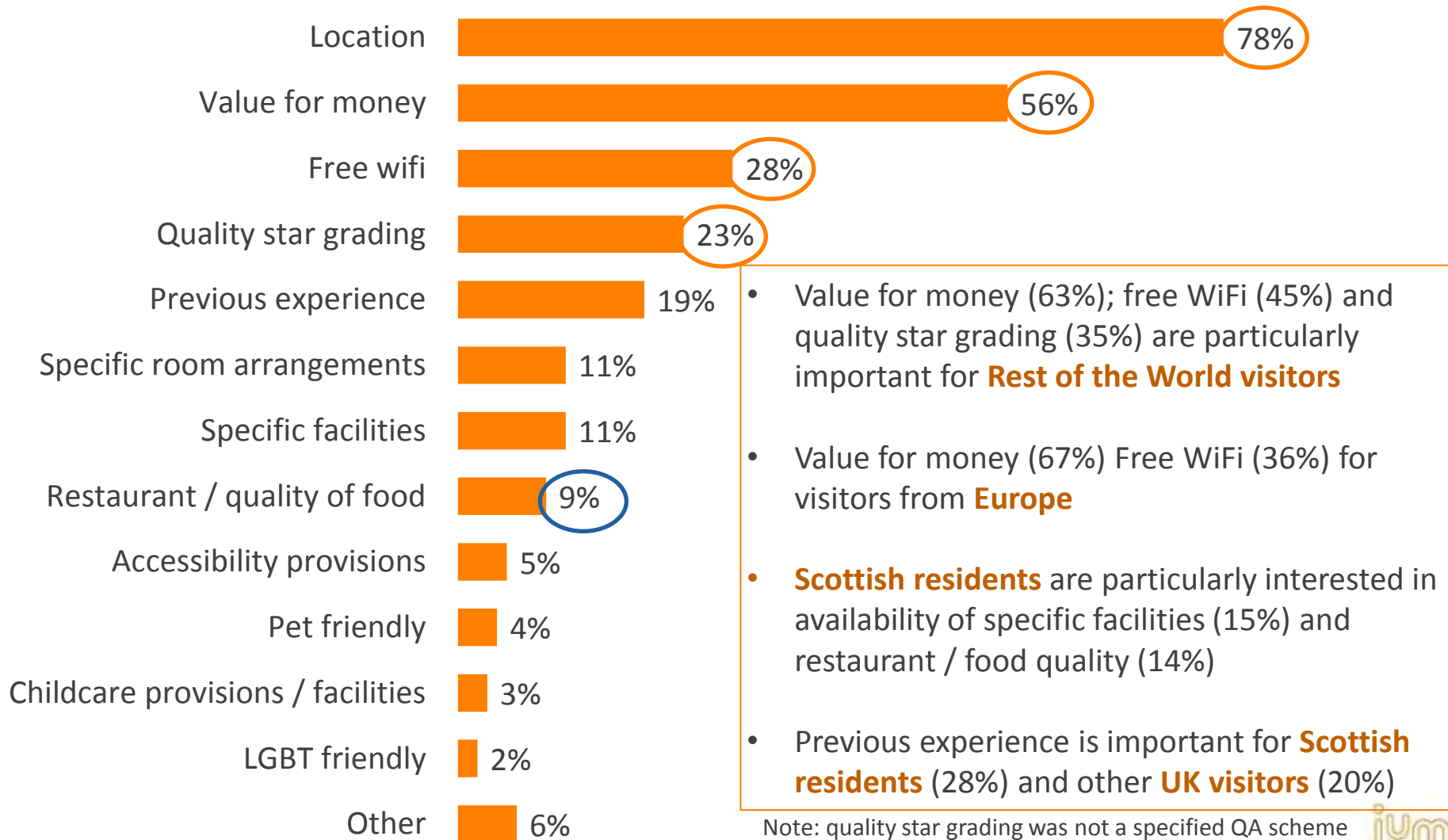
Background to 2015 survey



- ❖ VisitScotland regularly undertake Scotland-wide visitor surveys
- ❖ Past surveys have been undertaken in 2004/2005, 2007/2008 and 2011/2012
- ❖ The content of the survey is updated each time to reflect consumer and market changes at the current time. Each time, the survey explores different areas of the visitor experience
- ❖ The 2015/2016 Scotland Visitor Survey is a 2 year research programme covering 19 regions of Scotland. The 2 year programme is required to gain robust sample sizes for reporting at a regional level
- ❖ The Scotland Visitor Survey is a **summer only survey**, and due to the scale of the project , it is not carried out for the full year. As such the results reflect the views of the main holiday season visitors who were in Scotland during May-September.

Choosing accommodation

Location & value remain key decision factors when choosing accommodation, but availability of free WiFi is 3rd factor

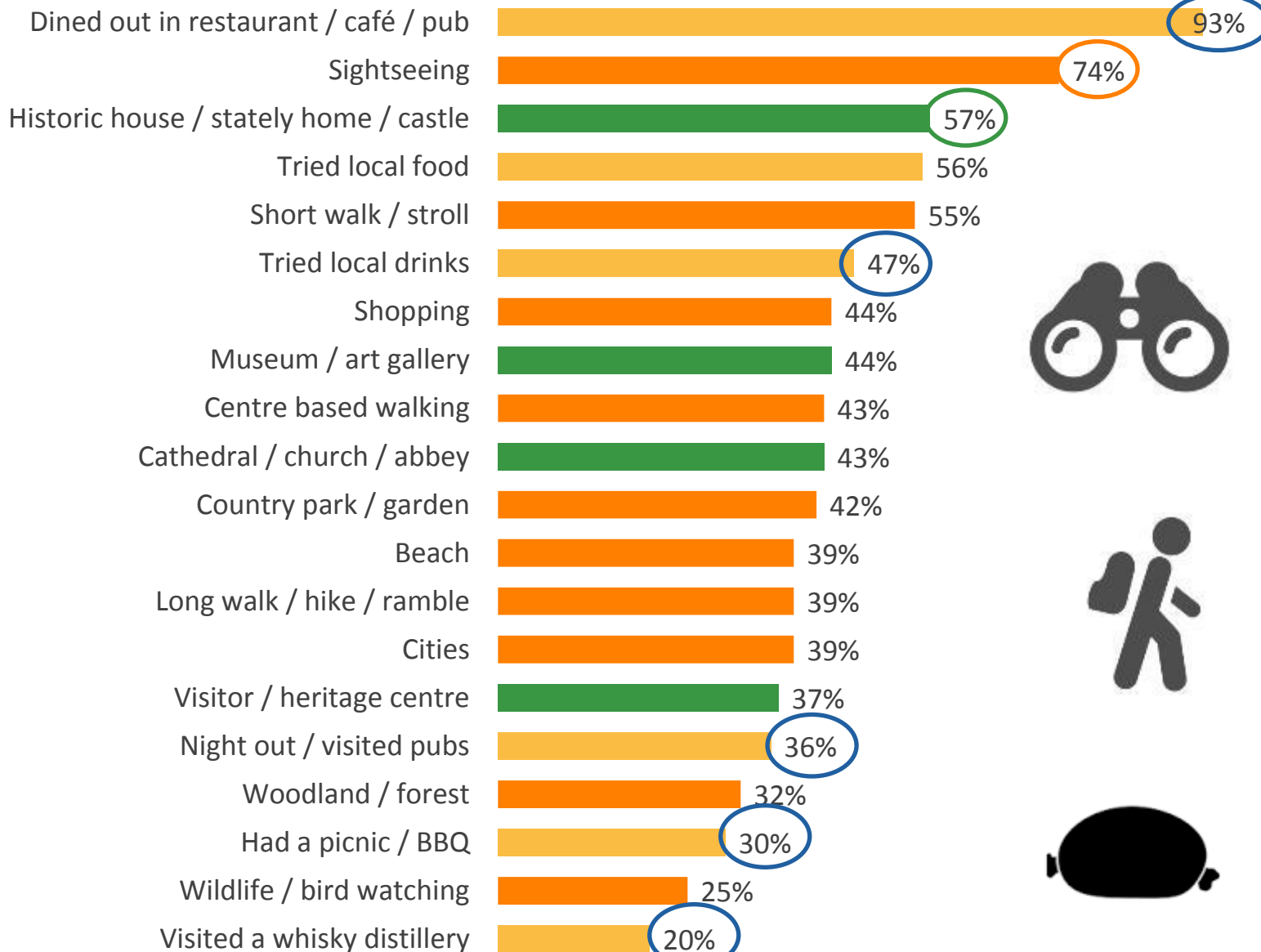


Q20 Which of the following aspects, if any, were important in helping you choose your accommodation?

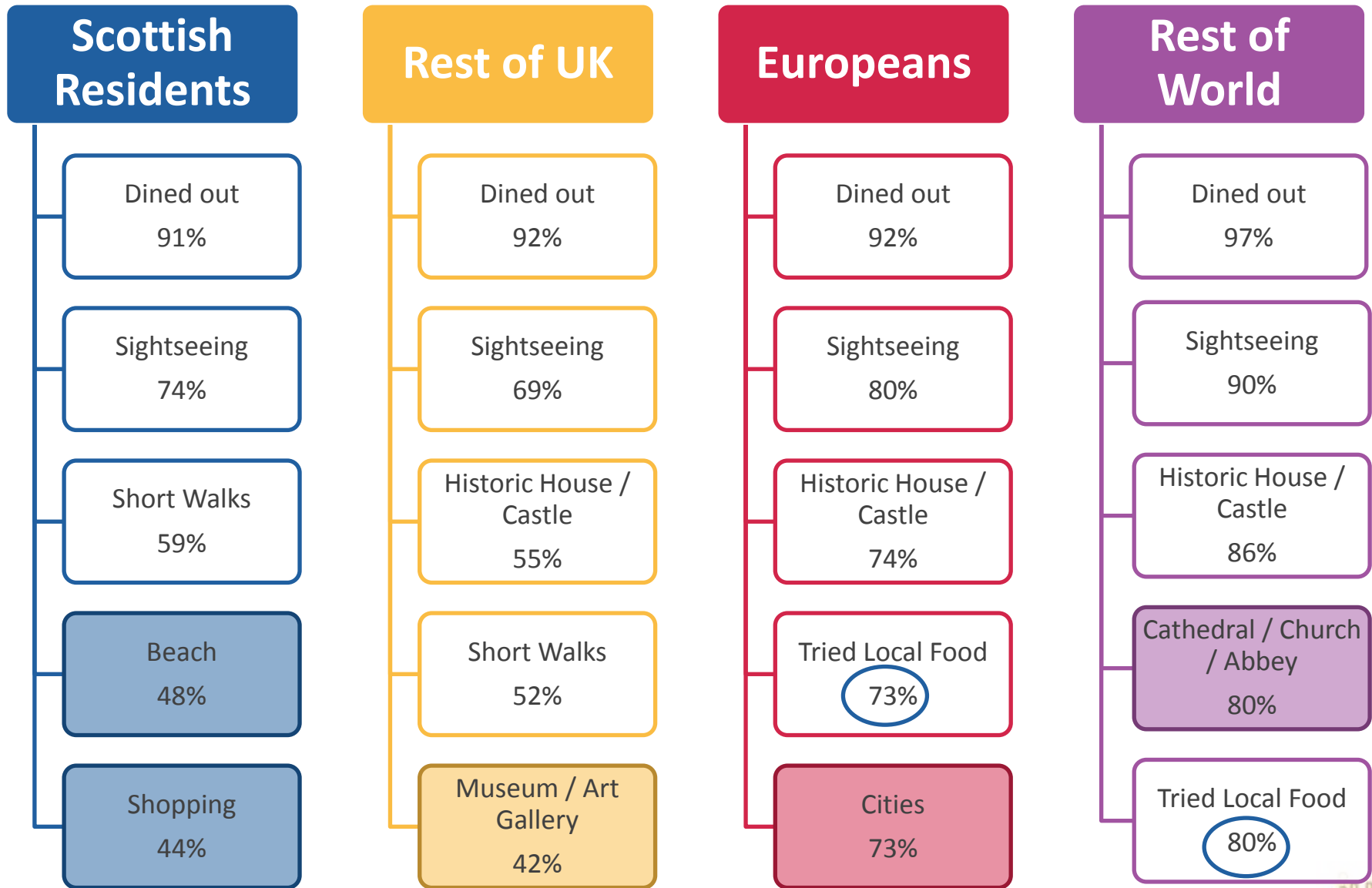
Base: S2 All who didn't only stay in second home or with friends / family (1448)

Top 20 Activities undertaken

Visitors engaged in a wide range of activities during their trip



Top 5 activities by market



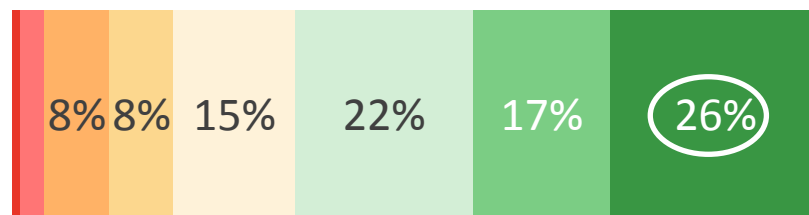
Base: S2 All visitors from Scotland(273); Rest of UK (465); Europe (373); Rest of World (359)

Food and drink

Trying local food and drink is an integral part of the visitor experience, particularly for international visitors, who show a strong desire to find out about local foods

When on holiday I really like to find out about the local foods & local dishes unique to the destination

Mean



7.9

■ Disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ Agree strongly

9% said the reputation of the restaurant / quality of food was a factor in choosing their accommodation

Rest of World 8.4
Europe 8.2

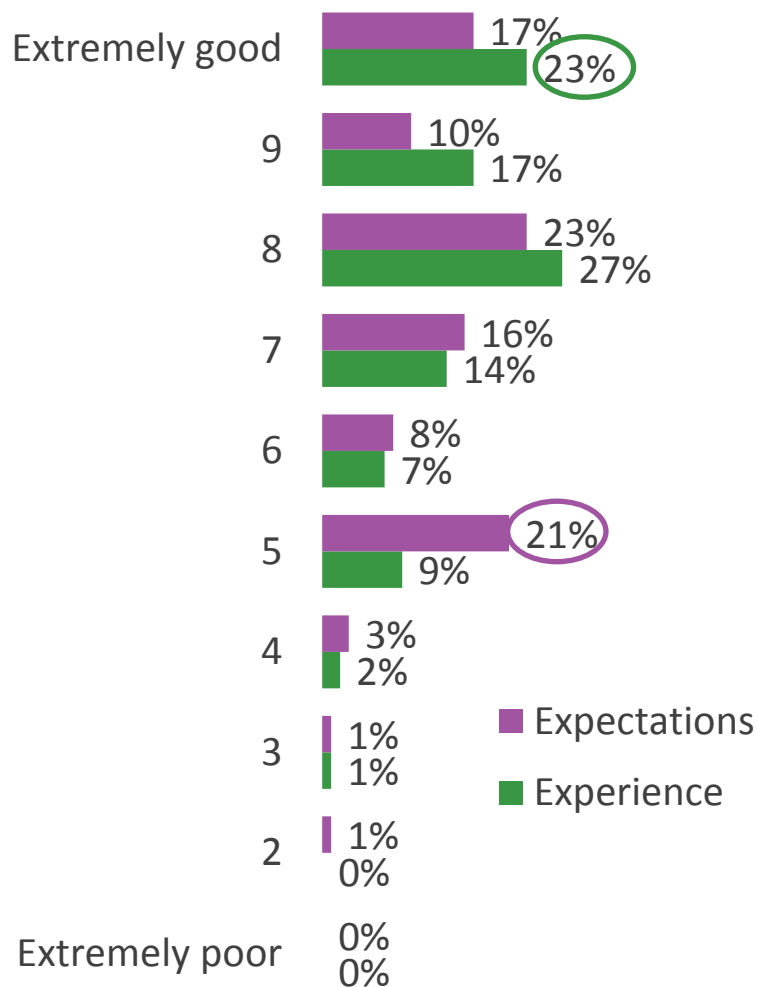


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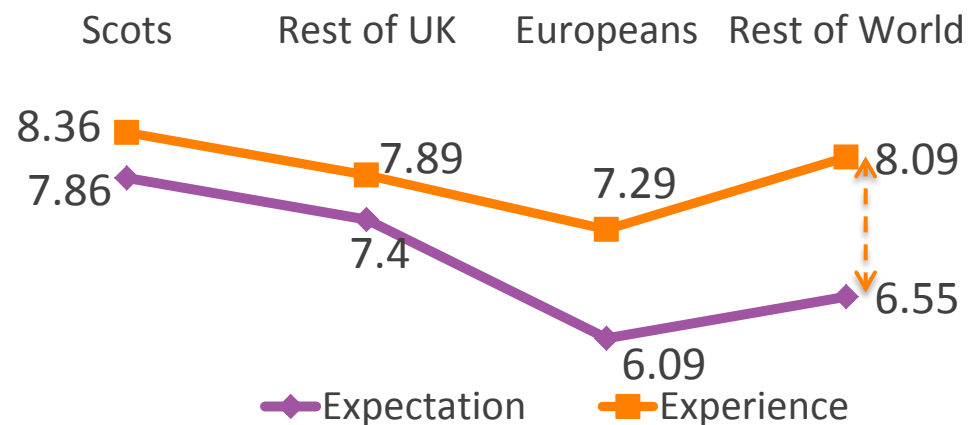
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Quality of food - expectations vs experience

A gap exists, especially for international visitors between expectations and experience of Scottish food



Mean Score
Expectation 7.3
Experience 7.9



Q34 Now thinking about the quality of food in Scotland, please complete the following statements:

- Before my trip I expected the food in Scotland to be...
- During my trip the food I experienced was generally....

Base: S2 All (1608)

Food & drink experiences

Around half of all visitors tried local food & drink during their trip, higher amongst international visitors



- **Visitors from the Rest of the World** were most likely to try local food (80%), local drinks (73%), have a night out (56%) and a third visited a distillery
- **European visitors** were also more likely to try local food (73%), local drinks (67%), have a night out (43%) and visit a distillery (40%)

Information sources used to help choose places to eat out

Three-quarters of visitors sought information about eating out whilst in Scotland, mostly from local people



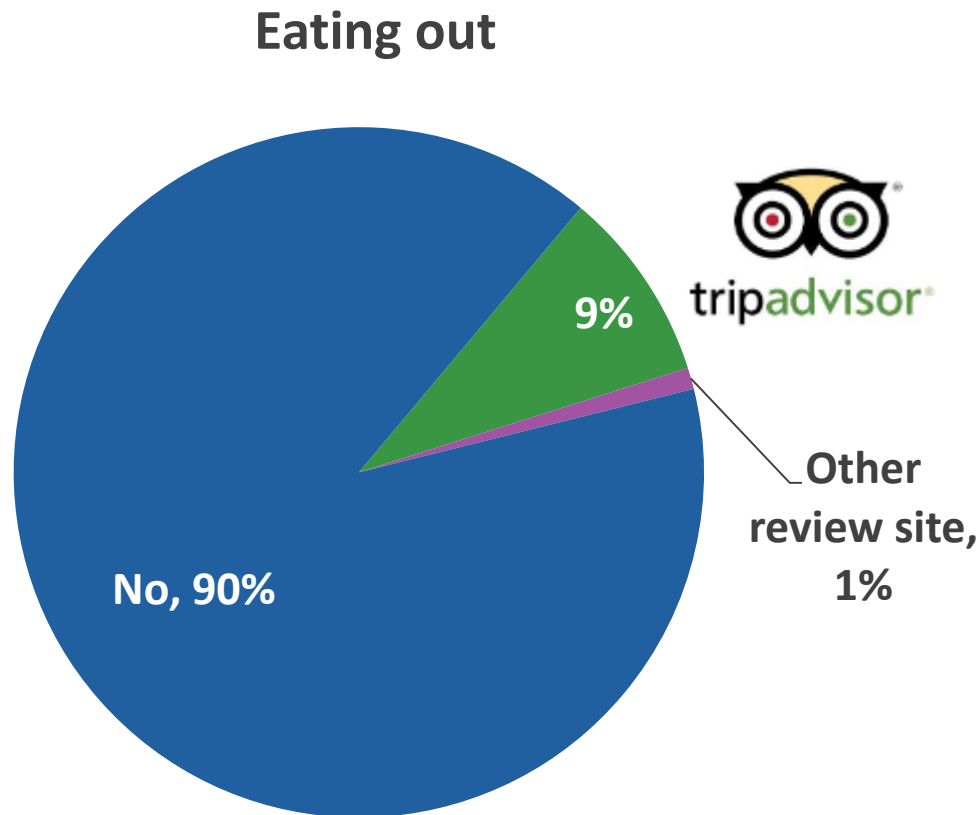
VICs and vs.com used much less for information on eating out than for things to see and do (34%)

- Talking with locals (70%) and personal advice from accommodation (45%) were particularly important sources for Rest of World visitors
- Printed guide books were most consulted by visitors from Europe 26%

Q36 During your holiday or short break in Scotland, which of the following sources of information did you use to help choose places to eat out?
Base: S2 All who dined out (1504)

Reviews relating to places ate out

1 in 10 visitors posted reviews about places they dined in Scotland, half the number who posted reviews on accommodation. Almost all eating out reviews were posted on tripadvisor



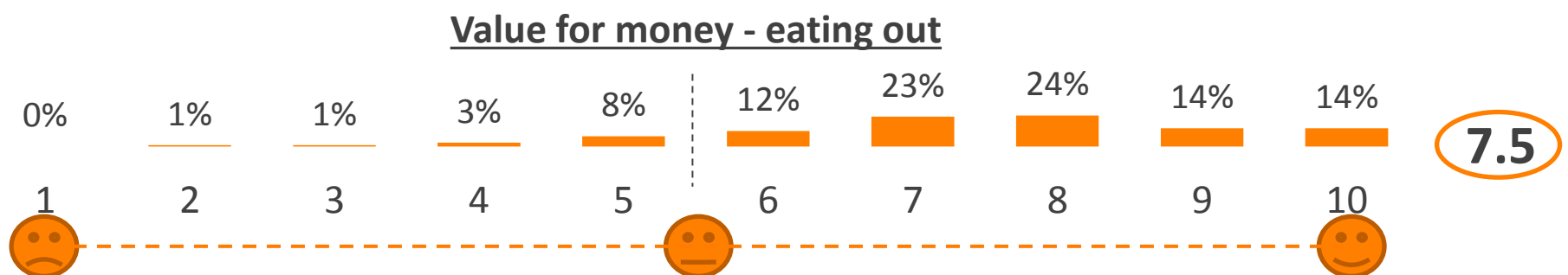
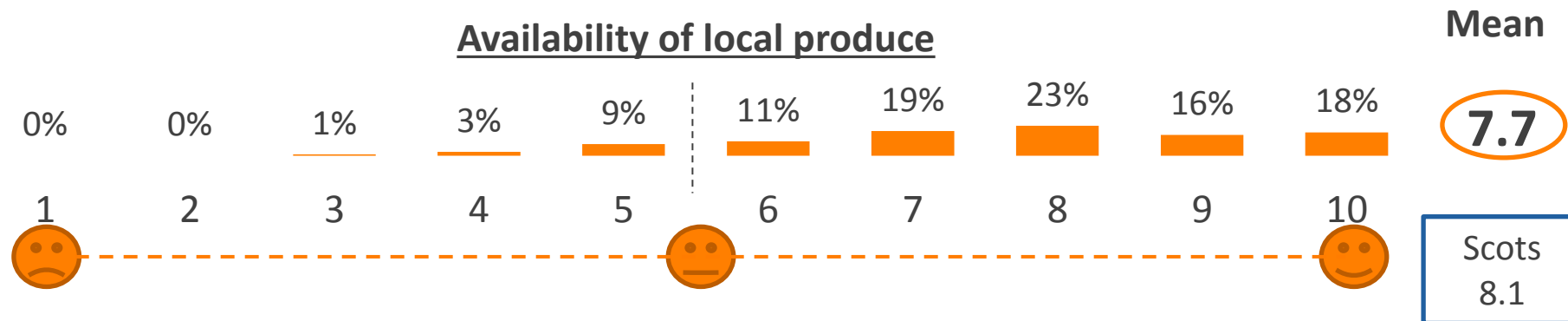
Reviews much less common here compared with 19% posting reviews on accommodation; and 44% using review sites for holiday planning.

Q37 Did you leave any reviews relating to places you ate out in Scotland on TripAdvisor or another review website?

Base: S2 All who dined out (1504)

Food & drink ratings

Local produce was generally available when eating out. Value for money of eating out was considered lower than for activities or accommodation.



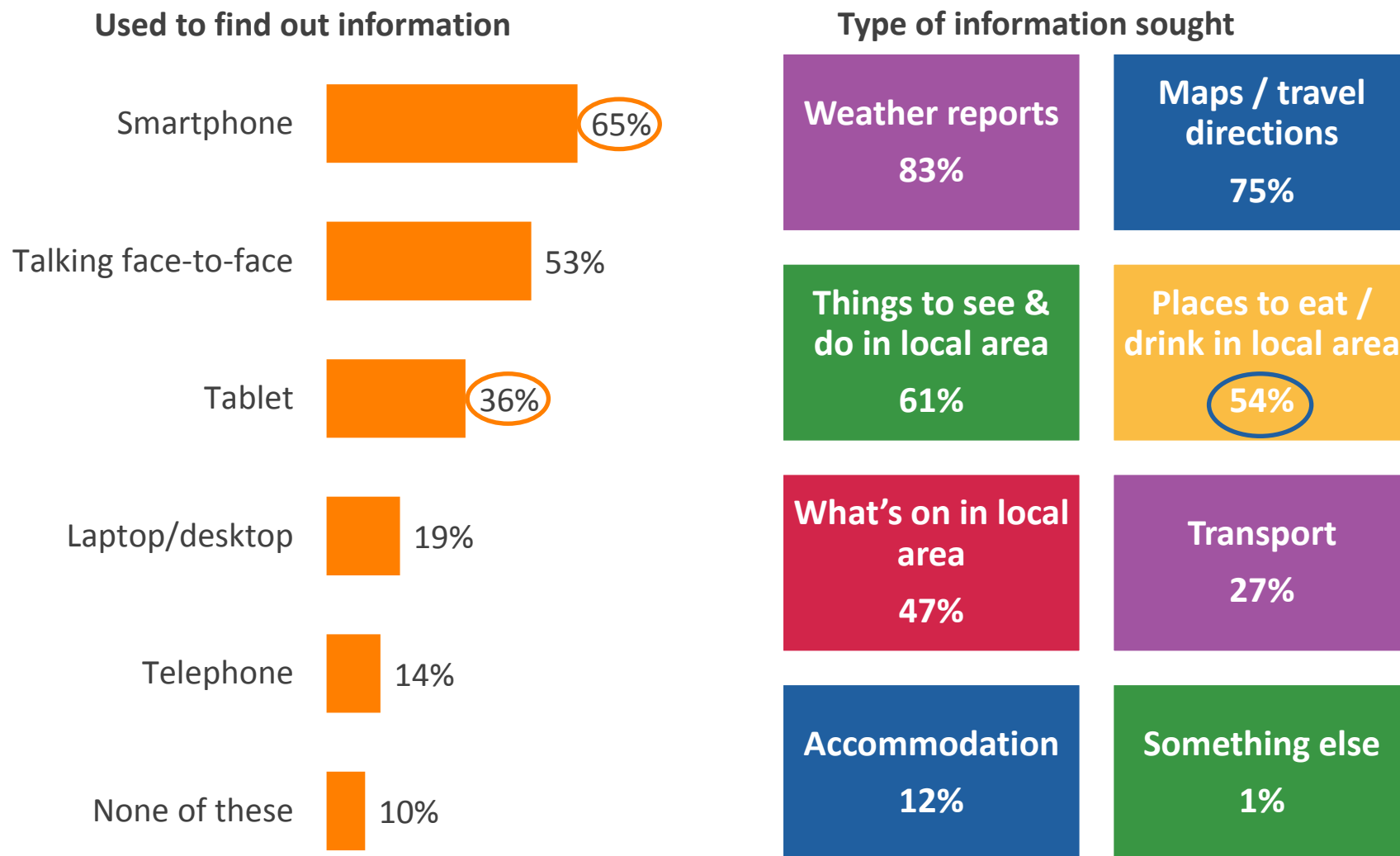
Value for money of eating out rated lower than for accommodation or activities; especially by international visitors

Scottish res. 7.8
Rest of UK 7.6

Q38 Overall how satisfied were you with the following aspects of eating out during your holiday / short break in Scotland. 1=extremely dissatisfied, 10 = extremely satisfied
Base: S2 All who dined out (1504)

Usage of devices to find information during trip

High usage of smartphones and tablets to find out info whilst in Scotland, but face to face interaction still important



Q39 During your holiday or short break in Scotland, did you use any of the following to find out information relating to your trip while you were in Scotland? Base: S2 All (1608);

Q40 What type(s) of information did you look for during your trip? Base: S2 All who looked for information (1475)

Satisfaction across the visitor experience

Satisfaction with....	Mean score
Ease of getting around	8.7
Being made to feel welcome in VIC	8.5
Availability of useful information in VIC	8.4
Accessibility of accommodation	8.4
Service provided by staff at accommodation	8.3
Value for money of attractions	8.3
VIC customer service	8.3
Accessibility of attractions	8.3
Knowledge of staff at accommodation about things to do in local area	8.3
Value for money of accommodation	7.9
Availability of local produce when eating out	7.7
Value for money of eating out	7.5
Availability of free WiFi at accommodation	7.5
Mobile phone signal coverage	6.7
Availability of free WiFi	6.6
Availability of 3G / 4G	6.1

Strong performance across most aspects of the visitor journey, for both functional and service areas. Only area where satisfaction is lower relates to digital connectivity

Appendices



Loch Na Keal, west side of Isle of Mull, Inner Hebrides

Objectives

The main objective for this survey was to understand visitors to Scotland through the analysis of their behaviour and an understanding of their visitor experience.

- ❖ The insights gained from the survey feed into the development of business and marketing strategies for VisitScotland which aims to maximise the number of visitors and spend to Scotland.

- ❖ The survey focuses on expanding the understanding of visitors to Scotland in terms of:

- the visitor journey
- motivations to visit Scotland and expectations of the quality of experience
- visitor behaviour across many areas of the visitor experience
- satisfaction with key aspects of a trip in Scotland
- the role of technology at different stages of the customer journey



- ❖ Additionally, the study is also expected to deliver the following benefits to the Scottish tourism industry:

- Inform product and marketing development for tourism businesses
- Enable tourism businesses to identify opportunities and threats for their marketing and business planning
- Provide Destination Marketing Organisations and local authorities with benchmark/comparison figures for more localised surveys (at the end of the two year study)

Using & Interpreting the Scotland Visitor Survey 2015

- **The Scotland Visitor Survey should not be viewed in isolation.** The survey collates views on a wide range of topics to supplement 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**
- The Scotland Visitor Survey is designed to understand visitor attitudes and behaviours across a range of measures.
- The Scotland Visitor Survey is undertaken during high 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 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

Scotland Visitor Survey 2015 – Food & Drink Extract Only

Sources

Scotland Visitor Survey 2015 carried out by Jump for VisitScotland.
Full results from the Scotland Visitor Survey are available:

www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx

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