



## VisitScotland Information and Sales Strategy Research

This is one of a number of pieces of related research commissioned by VisitScotland in 2005/06 as part of its information and Sales Strategy

### INDUSTRY ONLINE RESEARCH

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## **Background & Objectives**

This online industry survey builds upon existing qualitative research conducted in October/November 2005 with 52 tourism businesses and trade associations by George Street Research to measure industry opinion via the following objectives:

- to measure industry perception on which sources of information and advice are used and valued by visitors at the various stages of the 'customer journey';
- to identify any gaps in information provision that exist in relation to visitor needs that the industry are aware of;
- to understand trends the industry are aware of in relation to the current and future information needs of, and information sources used by, visitors;
- to ascertain what the industry's expectations are in relation to information & sales services from VisitScotland;
- to measure industry views on [visitscotland.com](http://visitscotland.com), in relation to VisitScotland's review of information and sales services.

## **Methodology**

To research the views of a wide range and geographic spread of tourism businesses it was decided to issue an online questionnaire, designed using the survey software Snap, to a representative sample of the Scottish tourism industry.

The questionnaire was designed, in conjunction with the Information & Sales project team during early December, and issued to subscribers of the 'eUpdate communication via Scotexchange, from 19<sup>th</sup> December 2005. Replies were closed off on 10<sup>th</sup> January 2006 to allow the analysis of all responses received to commence thereafter.

## **Sample/Response**

The questionnaire was issued to circa 8,000 eUpdate subscribers, via e-mail, inviting business owners/managers to follow an imbedded web-link to a hidden web-page on Scotexchange, allowing them to complete the survey online. By the close-off point 675 replies were received, equating to a response rate of 8.5%, which is an adequate response and allows any analysis on the total sample base to be statistically reliable.

## Summary

- According to the tourism industry, the majority of visitors look for information before visiting on both 'websites in general' and from 'friends & family/word of mouth'. 'Tourist Board literature' and the visitors 'Accommodation provider' are used to a lesser degree, by just less than half of visitors, with a similar number using 'visitscotland.com' as a source of information.
- Looking at visitor information needs, both on arrival and during their trip, the majority use a TIC and/or their accommodation provider, according to businesses. 'Tourist Board literature', 'Local people', and 'Independent guide books' are used by around a half of all visitors post-arrival.
- Tourism businesses say that of the various types of information sought by visitors prior to their trip, Accommodation (both in relation to booking and information) and Transport (both to and around Scotland) are essential requirements. However, post-arrival information needs tend to be more on attractions/activities to see and do and places to eat/drink.
- According to industry, more than two-thirds of visitors are perceived to source information easily, however better signage and promotion of TICs are seen to be the major areas for improvement.
- The vast majority of tourism businesses are of the opinion that they are responsible for providing information to visitors. The majority say that VisitScotland help them well in this regard however more than a third cite this as an area for improvement.
- Around half of businesses reckon that there are gaps in information provided to visitors however many comments are in relation to a perceived lack of a local TIC, or information point, in relation to their business or a specific town/village.
- TICs are seen as providing value to the majority of businesses and the vast majority of visitors, according to industry. Visitscotland.com is seen as being far more valuable to visitors than to individual businesses, with almost half of all businesses saying that there is little or no perceived value to them.
- TICs are regarded as well located, with the right mix of local versus regional/national knowledge available to visitors, according to most businesses. Issues are raised by a half of all industry respondents in respect of the perceived lack of promotion of TICs and their opening hours. Languages spoken at TICs are also an issue with around a third of businesses.
- A retail offering at TICs is agreed upon by the majority of businesses, irrespective of business type.

- The vast majority of businesses have a website and of those the vast majority say that they use their website to generate sales/bookings. For those businesses that have a website, around a half have the facility for visitors to 'book/purchase directly online', or at least have this facility in development.
- Out of all accommodation businesses responding, around two-thirds use online distribution services to generate bookings, with 'visitscotland.com' being used by the vast majority.