

# The Visitor Journey: Planning & Booking in the Digital Age

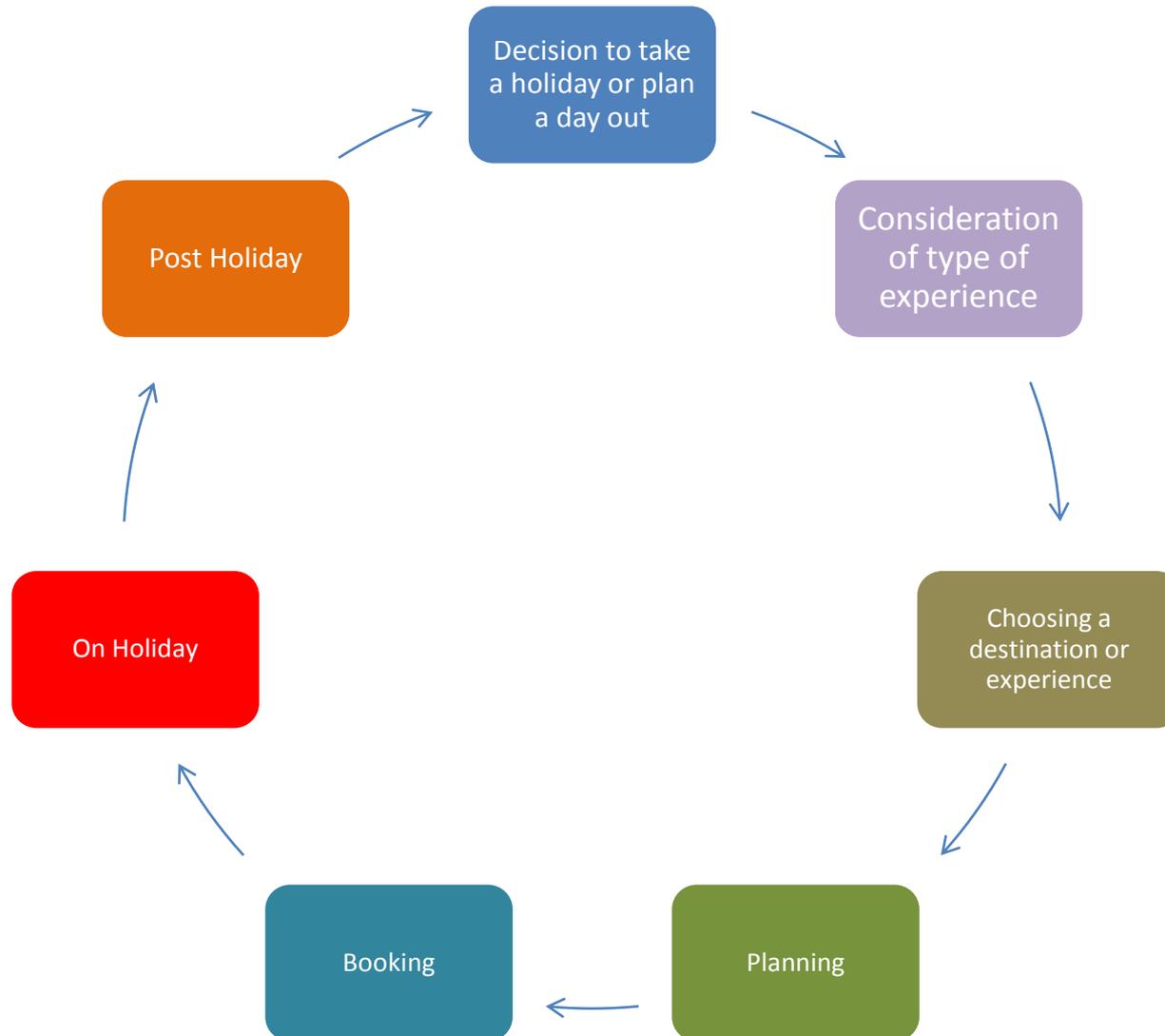


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- Introduction – The Visitor Journey
- The Practicality & Emotion of Digital
- The Value Conscious Consumer – Mapping the Visitor Journey
- Planning & booking, on arrival and trip sharing
- What does it mean for VisitScotland?
- Our collective challenge – discussion points

# Background – The Visitor Journey



# Why digital?

- Online is the logical starting place
- Inspirational
- Informative
- 24hr one stop shop
- Intuitive Googling
- Quick Fix or Geek Planning

Online offers emotional benefits:

- Independence
- Anonymity
- Community
- Control
- Bargain Hunter
- Uncomprimising

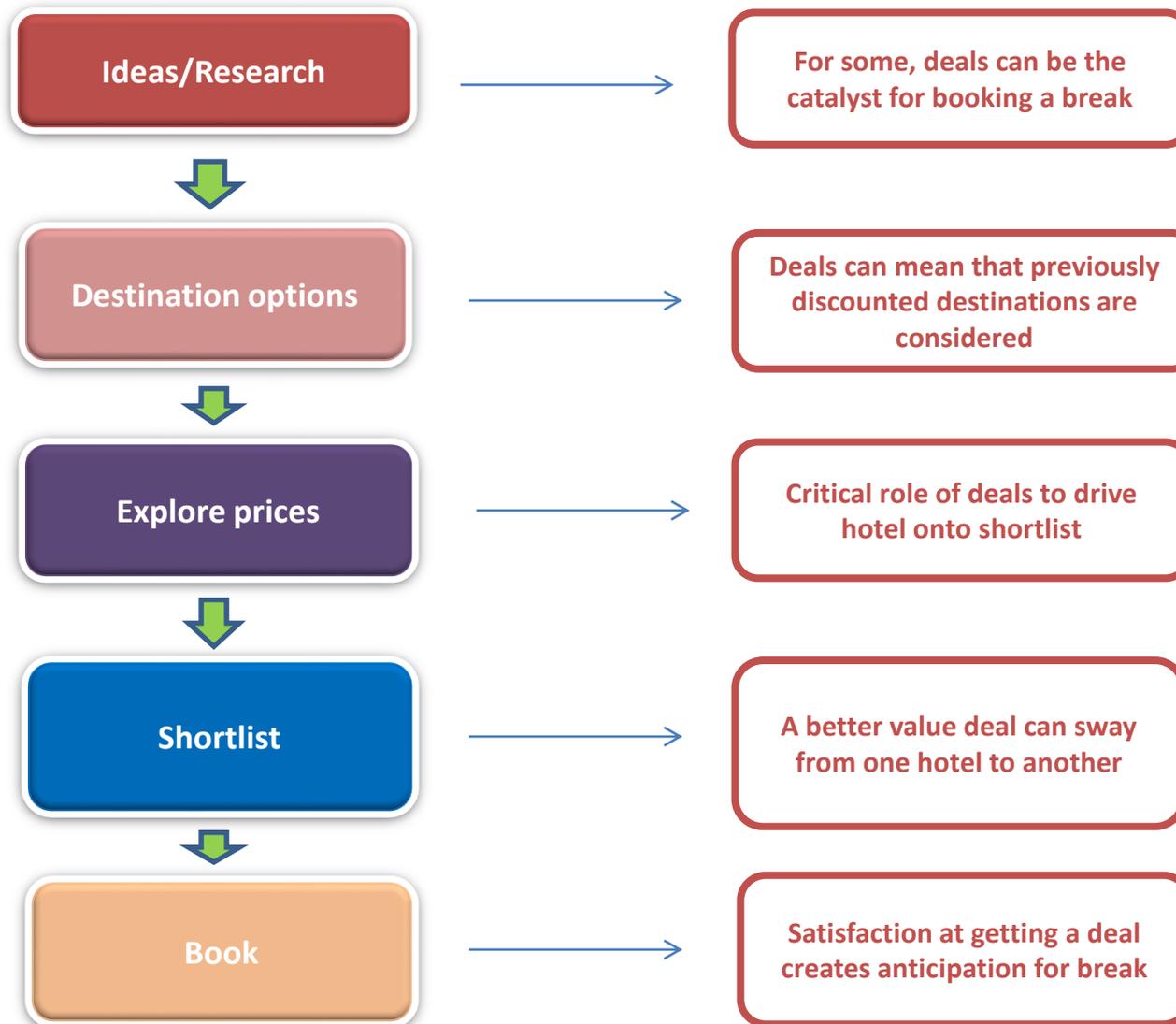
**The internet is a tremendous enabler and is therefore the first port of call for increasing numbers of people**

# Consumer Feedback

“I used Wikipedia to gain *more of an understanding* of locations, as it provides historical facts and it is linked to other web sites. I found it useful in helping me to decide the location that I wanted”

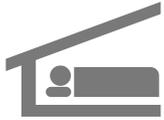
“We just put ‘cheap castle accommodation in Scotland’ into *Google* and ended up staying in a fifteenth century tower”

# Deal Hunters



# Booking Accommodation

Online sources dominate how visitors book accommodation. Booking direct via the accommodation website is the most popular method.



Accommodation

**64%** Booked accommodation online

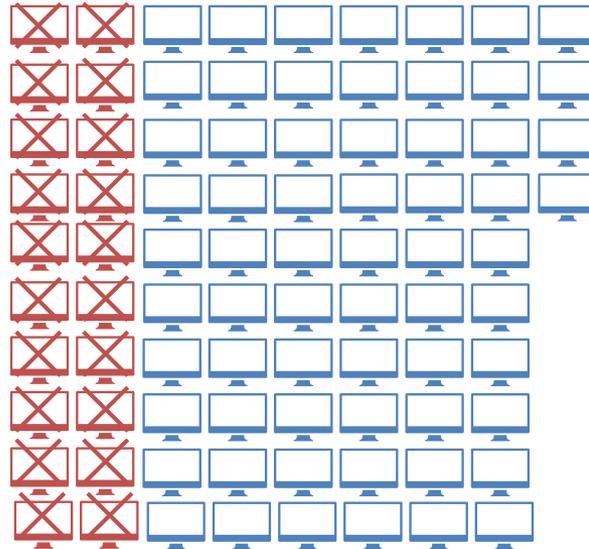
**41%** Accommodation Website (inc VisitScotland.com)

**10%** Internet travel agent

**9%** Accommodation by email

**4%** Website of tour operator/  
travel company

**20%**  
booked offline



**13%** Accommodation by phone

**1%** Travel agent

**1%** Tourist board

**5%** Others

**2%** Don't know/not stated

**14%**

didn't book in advance or stayed with friends: And the younger you are the more likely this is!

SOURCE: Q16a How did you book your accommodation. Base: All respondents who booked independently (2415)

Survey Context: Summer Survey only

# Regional Results

	<b>Borders</b>
Accommodation website	43%
Accommodation by telephone	13%
Internet Travel Agent	14%
Accommodation through email	7%
Website of a tour operator or travel	3%
visitscotland.com	2%
I didn't book any accommodation in advance	12%
Other	6%

SOURCE: Q16\_a How did you book your accommodation? Base : All respondents who booked accommodation and travel separately

Base: All respondents who booked separately(1417)

Survey Context: Summer Survey Only

The arrival stage is usually the point when day to day planning of activities and excursions is finalised

- Vast majority of activities are not pre-planned for short breaks.
- Most want the spontaneity of spending time 'as they please' (although a few very organised with itineraries and spreadsheets)
- Weather and mood felt to be changeable so planning on the day was easier to manage and more fruitful
- Exception is certain events – tickets for the Tattoo, Fringe, Hogmanay often secured prior to accommodation during planning.

*I don't want to plan our time before we get there, that's part of the fun having the time stretch out and working out what you fancy doing on the day*

***Pre Nester, Manchester***

*I love that feeling you get when you've got into the room, can have a cup of tea and look at the folder to decide what you're going to do, it's great!*  
**Post Family Manchester**



Visitors are accessing information through a wide range of resources when they are in Scotland, by using offline sources such as guidebooks, interacting with others and also using technology such as smart phones

- **34%**
- **Guidebooks/ Brochures**



Guide books (e.g. Fodors, Lonely Planet)	29%
Tour operator's brochure	9%

- **47%**
- **People**



Asking locals	35%
Asking proprietors/ service staff	23%
Asking other travellers	12%

- **57%**
- **Online**



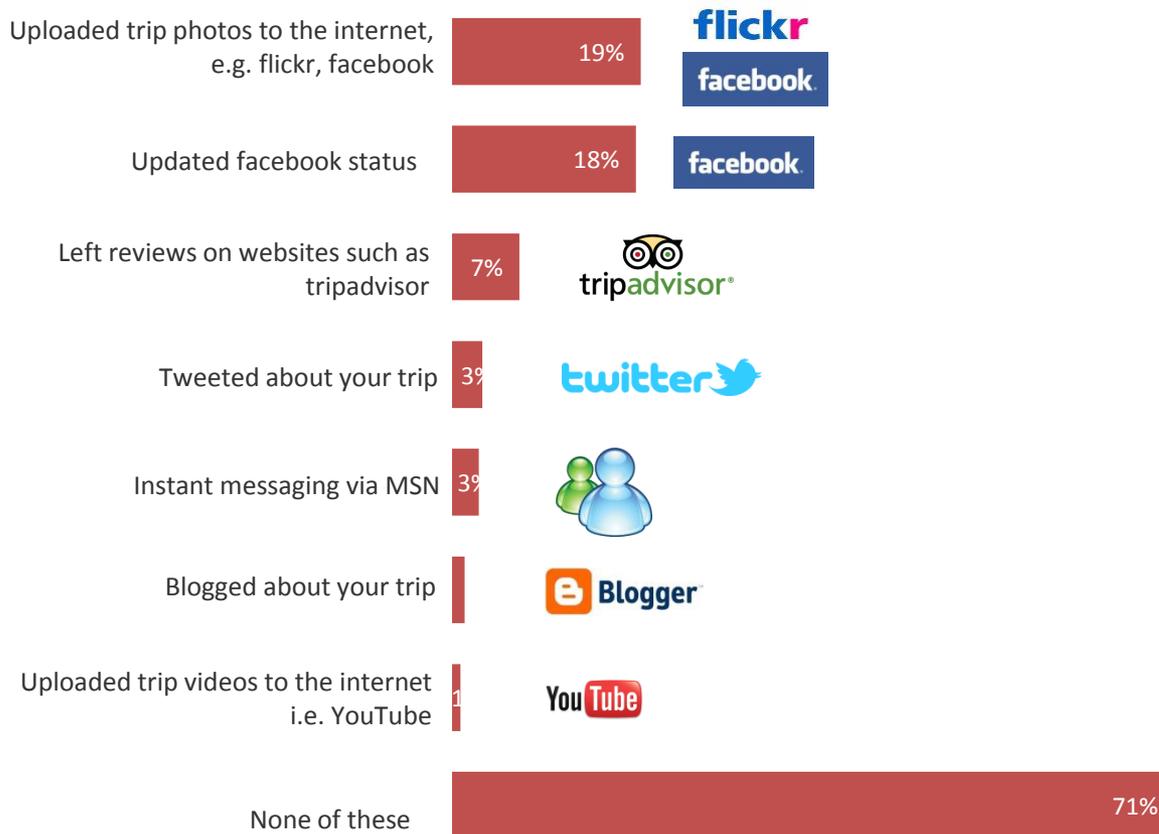
Smartphone	31%
A Laptop	27%
An Ipad/tablet pc	10%
Internet in the reception or another public area.	9%
The VisitScotland Days Out App	3%
Visited an internet cafe	3%

- Tablet usage increased from 6% in 2011 to 15% in 2012 (average 10% over both years)
- Smartphone increased slightly from 30% to 32% (average 31% over both years)

Source: Q22 And during your trip which of the following other methods, if any, did you use to obtain information about places to visit and things to do? (3309)

Survey Context: Summer Survey only

## 29% of all visitors in 2012 used any online platform to talk about their trip



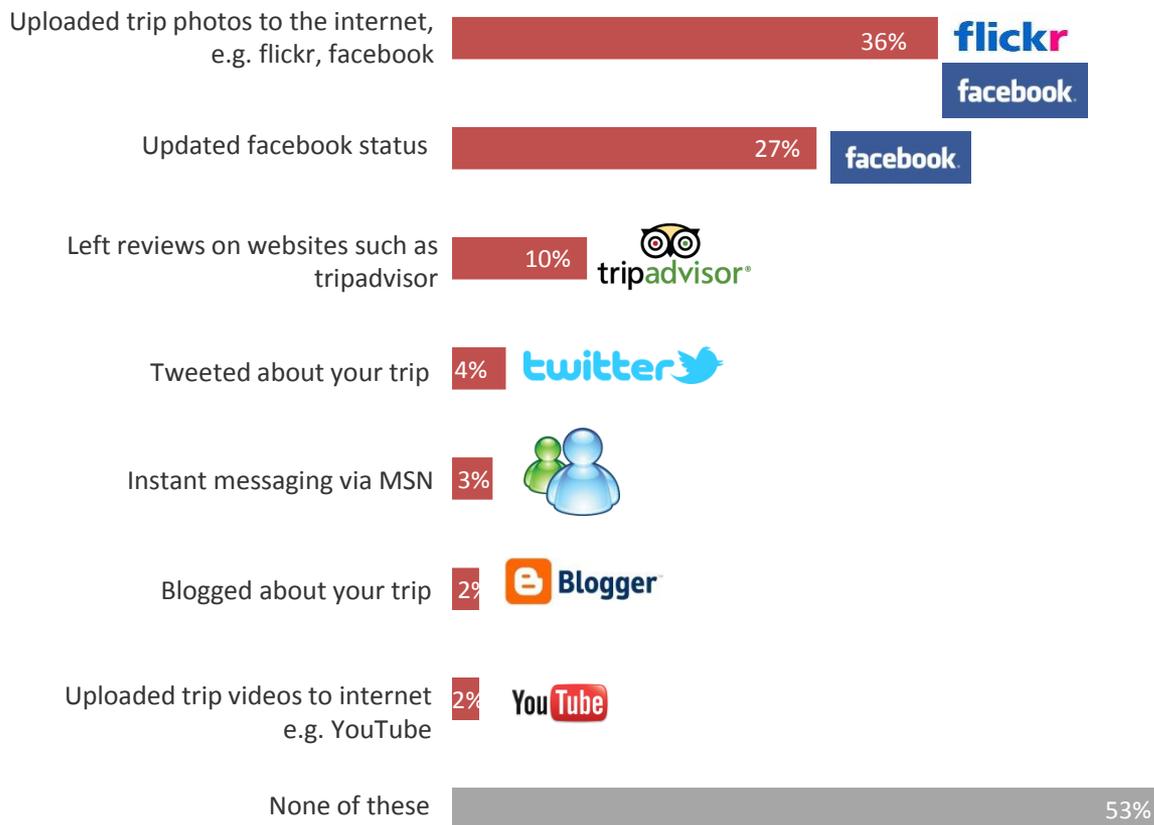
During the trip, around 1 in 3 visitors shared their trip experiences while they were in Scotland. This is most likely through uploading trip photos to the internet and updating their Face book status.



UK and repeat visitors are the most likely to be talking online about their trip during the trip

Q22a. During your trip, did you do any of the following? Base: All respondents who used the internet during their trip – only asked in 2012 to those who had used internet but rebased all 2012 respondents to allow comparability with next slide (1427)

## After the trip, 47% of all visitors used any online platforms to talk about their trip



After the trip, almost half of visitors shared trip experiences online, particularly through uploading photos. Encouragement to engage in more online conversations could prove to be

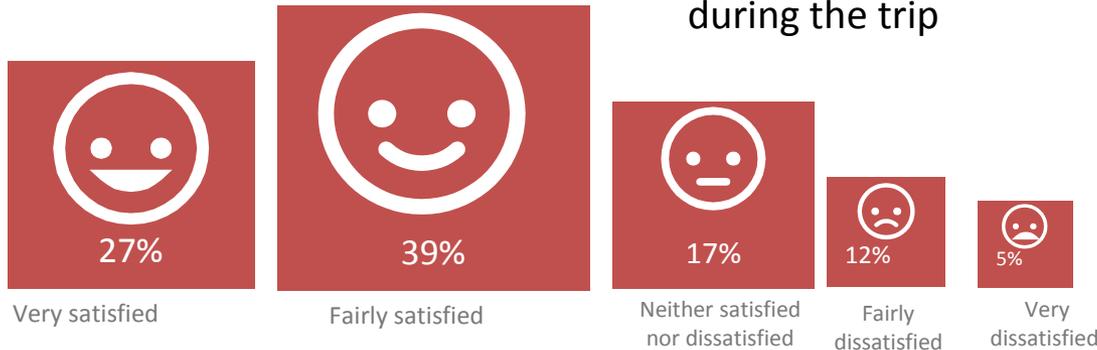


Unlike sharing information during the trip, Overseas and first time visitors are the most likely to be talking about their trip online in various ways

Q38. After your trip, did you do any of the following? Base: All respondents (3309)

Visitors are less satisfied with the Wi-Fi and broadband access. This may limit their ability to share experiences during the trip

The availability of mobile phone reception

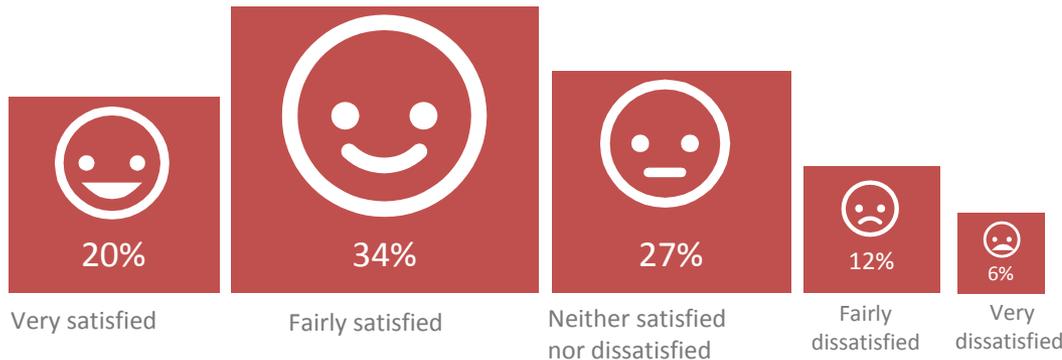


“Better mobile and wifi reception”

Mean score  
(out of 5)  
**3.70**

“Certain areas lack 3G reception which can be important for navigation but also in some areas there is no basic reception for mobiles. These are becoming more relied upon by users.”

The availability of wi-fi and broadband



Mean score  
(out of 5)  
**3.49**

“Wider WiFi access especially in airports and other public places.”

Q34 And thinking about your trip in Scotland overall, how satisfied were you with each of these aspects?

Base: All respondents except not applicable in 2012 (these questions not asked in 2011) Mobile phone reception base (1286), Wifi/broadband base(1157)

# Summary

- Online is often the first port of call
- The biggest shift is post family group
- Smartphone and tablet ownership is growing rapidly
- Local Content is critical
- Information needs on holiday are not demanding or hard to fulfil.

# VS Channel Mix - Overview

Channel	Engagement Levels Per annum	+/- demand levels
Face to face	3.4m visitors	-
Phone	CC- 35,000 calls VICs – 151,000 calls	-
Email (outbound)	21,810,000	+
Social	220,000 facebook 50,000 twitter	+
Web	14m unique visitors across the VS family of sites	+
Print	200,000 postal requests 61,417 digi downloads	-