

From: Riddell Graham
Sent: 06 October 2016 14:55
To: Mark Wrightham
Subject: FW: SNH project on the Uplands

This is the attached feedback from our Head of Insights, Susan Dickie, which I hope helps your strategy development. I am still waiting on data from our web analytics people which I think could also add credibility to what visitors are looking for in terms of “uplands” and will send this on to you next week.

Any queries give me a shout – or contact Susan direct

Best wishes

Riddell

Riddell Graham
Director of Partnerships
VisitScotland

From: Susan Dickie
Sent: 04 October 2016 16:32
To: Riddell Graham
Subject: RE: SNH project on the Uplands

Hi!

A few thoughts on the “uplands” scoping.

I completely agree with the writer that getting a definition of what are the uplands is key to the success of this visioning exercise. Otherwise the scope will be so broad as to cover the majority of Scotland.

My own feeling is that from the perspective of a general visitor, uplands will be any hilly or mountainous region. Those with more knowledge of specifics, eg serious mountain bikers, skiers, munro baggers etc, may be able to differentiate between low and high hills, mountains etc.

Importance of the uplands for tourism -

All of our research points to our landscape and scenery being one of the foremost motivations for a trip to Scotland. This comes in research amongst both current visitors and general holidaymakers who haven't already visited.

National statistics – the national statistics give a picture of the volume and value of tourism in the regions of Scotland, and can be provided as required for the work. Chris tells me that there is already a project ongoing with TNS to produce a cut of the domestic tourism stats on an altitude / location basis (a joint project with the other NTBs). Obviously we'd be able to share any information we get from that in due course.

Our comprehensive visitor survey (amongst main season visitors to Scotland) contains a number of pointers as to the importance to visitors – the extracts attached show that landscape and scenery was the number one motivator for those answering our 2015 survey, and the areas visited by these

people also shows the popularity of countryside areas. There is also a question which links to the requirement for us to ensure that we are safeguarding the natural environment

The attached Insight paper summarises much of our recent qualitative research into people's perceptions of Scotland (and confirms our earlier research findings on this). A particular point to highlight is the way people visual Scotland's natural landscape – "People – across all geographical markets – expect to be awed by the majesty, openness and sheer scale of Scotland's landscape; they think in terms of 'breath-taking and dramatic' rather than 'picturesque and pretty' and this makes the natural environment stand out from other destinations, including domestic competitors"

Riddell, I hope that this helps. We'll obviously be very happy to help this exercise by inputting what we have.

Susan

Susan Dickie
Head of Insight
VisitScotland