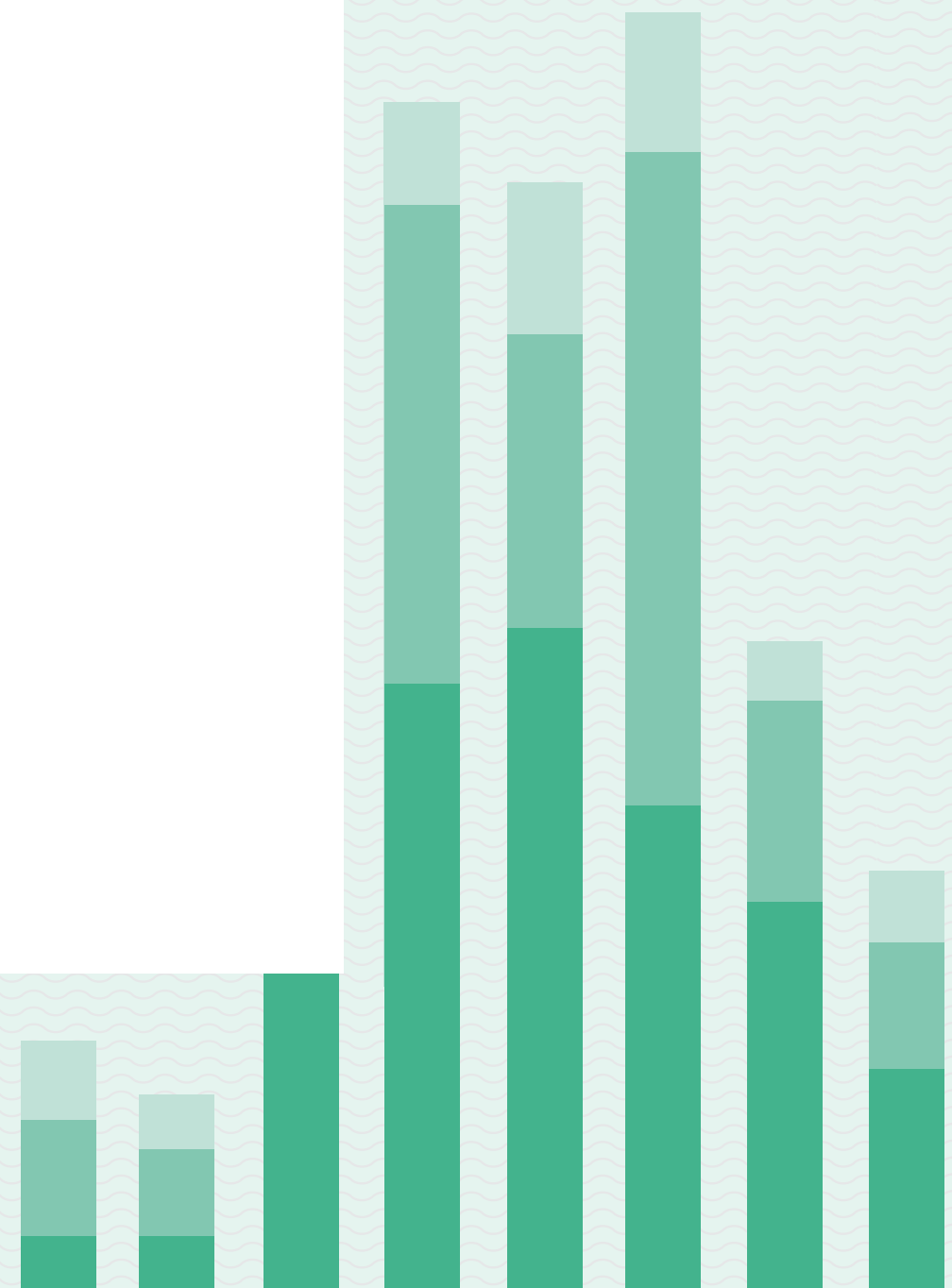




Report

trivago Industry Insights: Scotland

Discover key findings about traveller
search behaviour



Metasearch users' behaviour in Scotland

For 68% of UK travellers¹, the online booking journey starts on metasearch. Not only that, two out of three guests are searching for a hotel online, and they are leaving behind a huge data footprint.

trivago presents this travel trends report compiled from all searches to destinations in Scotland and user behaviour data from 2016-2017², revealing:

- where do travellers to destinations in Scotland come from
- what types of travellers visit Scotland
- who are visitors from the key markets
- how long do they stay & how much do they spend
- how seasonality affects the average clicked price
- how much travellers plan to spend per season
- what are the most popular destinations
- what is the seasonal traffic share of domestic & international travellers
- when do travellers search for a hotel
- which filters do they use

¹ Source: Phocuswright (June 2015): Search, Shop, Buy: The New Digital Funnel"

² About the data: the data is collated from all trivago searches to destinations in Scotland between 1 December 2015 - 30 November 2017, for hotel stays during the period of 1 December 2016 - 30 November 2017. All prices shown are the weighted average clicked prices selected by trivago users for a standard double room.

Over 400,000 hoteliers trust us to help them secure more bookings.

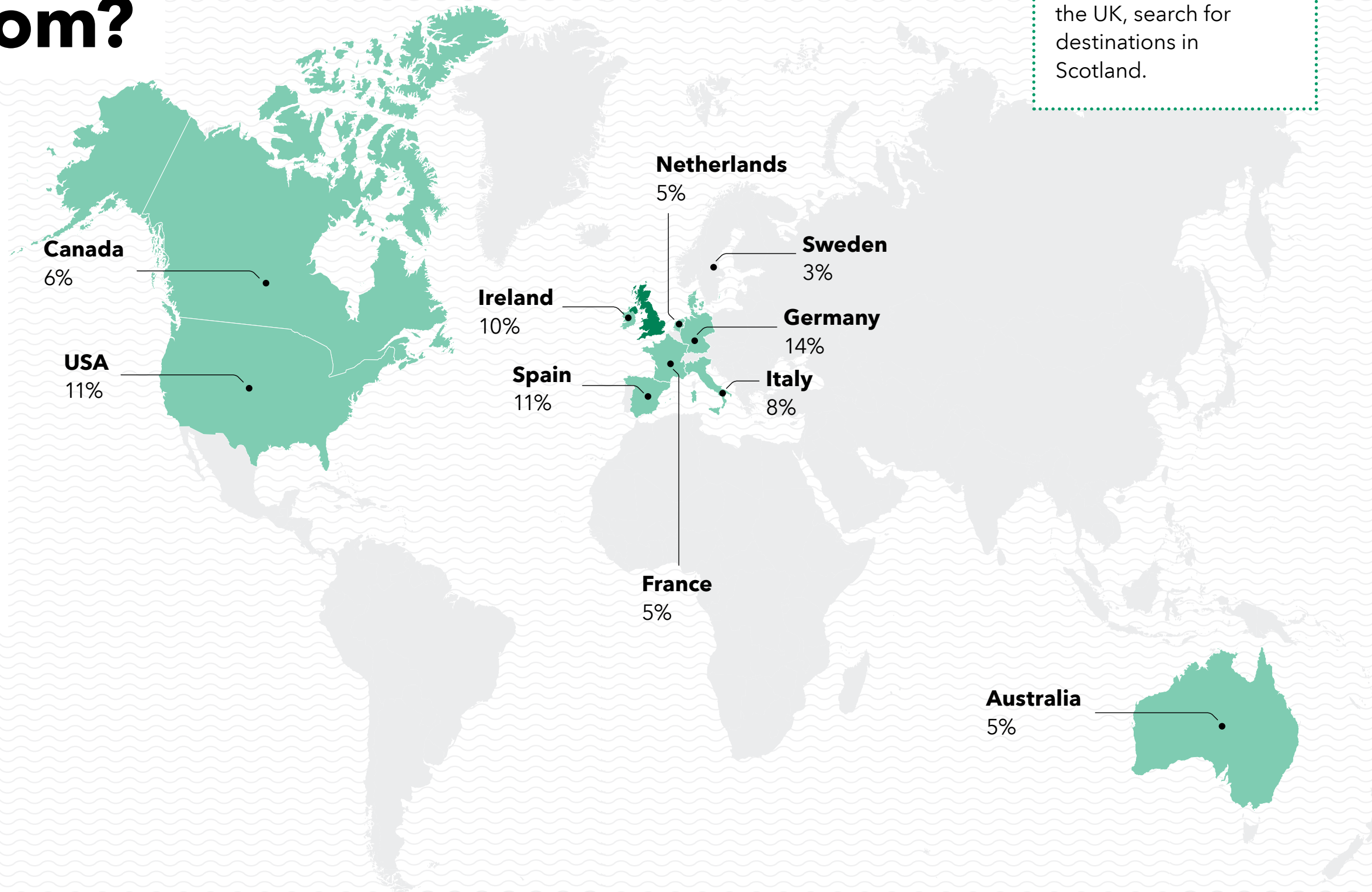
Here's why:
trivago is comparing deals from approximately **1.8 million of hotels**, on more than **400 booking sites**. We receive **millions of visits** per month from travellers looking for their ideal hotel for the best price.

Key findings & insights

Travellers: where do they come from?

77% of traffic to destinations in Scotland comes from domestic travellers

Based on search volume, **78%** of all international searches for destinations in Scotland come from just ten countries: Germany, Spain, the US, Ireland, Italy, Canada, the Netherlands, France, Australia and Sweden.



12% of all international travellers coming to the UK, search for destinations in Scotland.

What kind of guests travel to Scotland?

Weekend travellers account for the largest group of guests

Based on the analysed data, trivago identifies three types of travellers and their search behaviour.



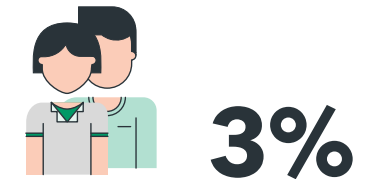
Business/weekday travellers

are those who look for stays of less than six days with the majority of stays on weekdays. They most frequently apply the filters for free Wifi, breakfast and gym, suggesting that they seek hotel features that offer them routine and home comforts.



Weekend travellers

are those who search for travel dates at the weekend. They are interested in a great breakfast, pool, 24-hour check in and other services that can add value and convenience to their stay.



Holiday travellers

are those who stay at least six days, and they plan and book their travel on weekends. They seek free Wifi, complimentary breakfast and swimming pool.

Who are the guests from the key markets?

The majority of visitors from the key markets are weekend and business/weekday travellers.

Data shows that six out of ten domestic travellers search for weekend stays and more than half of travellers taking long-haul flights from Canada, Australia and the US, search for visits during the week.

Visitors from Germany, Italy and Spain stand out from other markets with a higher number of searches for stays of at least six nights. Similar to UK residents, travellers from Ireland have the lowest number of searches for holiday stays and prefer weekend visits.



What are travellers willing to pay and how long do they stay?

The average clicked price per night increased by 0.2% over the previous 12 months.³

■ Avg. clicked price value per country n Average duration stay — Avg. clicked price for key markets



Guests from the key markets choose rooms at £120 per night on average and search for stays of 2 to 3 nights.

Visitors from Sweden can be considered as the biggest spenders, choosing prices 24% higher, on average, than domestic travellers.

Visitors from Ireland are the next biggest spenders, while visitors from Canada select the lowest average price-per-night at £102.

The average duration of stay reveals that the majority of visitors from the key markets search for stays of three nights on average, whereas travellers from Ireland and the UK search for the shortest stays of two nights, on average.

³ The average YoY price growth was calculated for all 55 trivago markets between following time periods: 1 December 2015 - 30 November 2016 and 1 December 2016 - 30 November 2017.

How do seasons affect the average clicked prices?

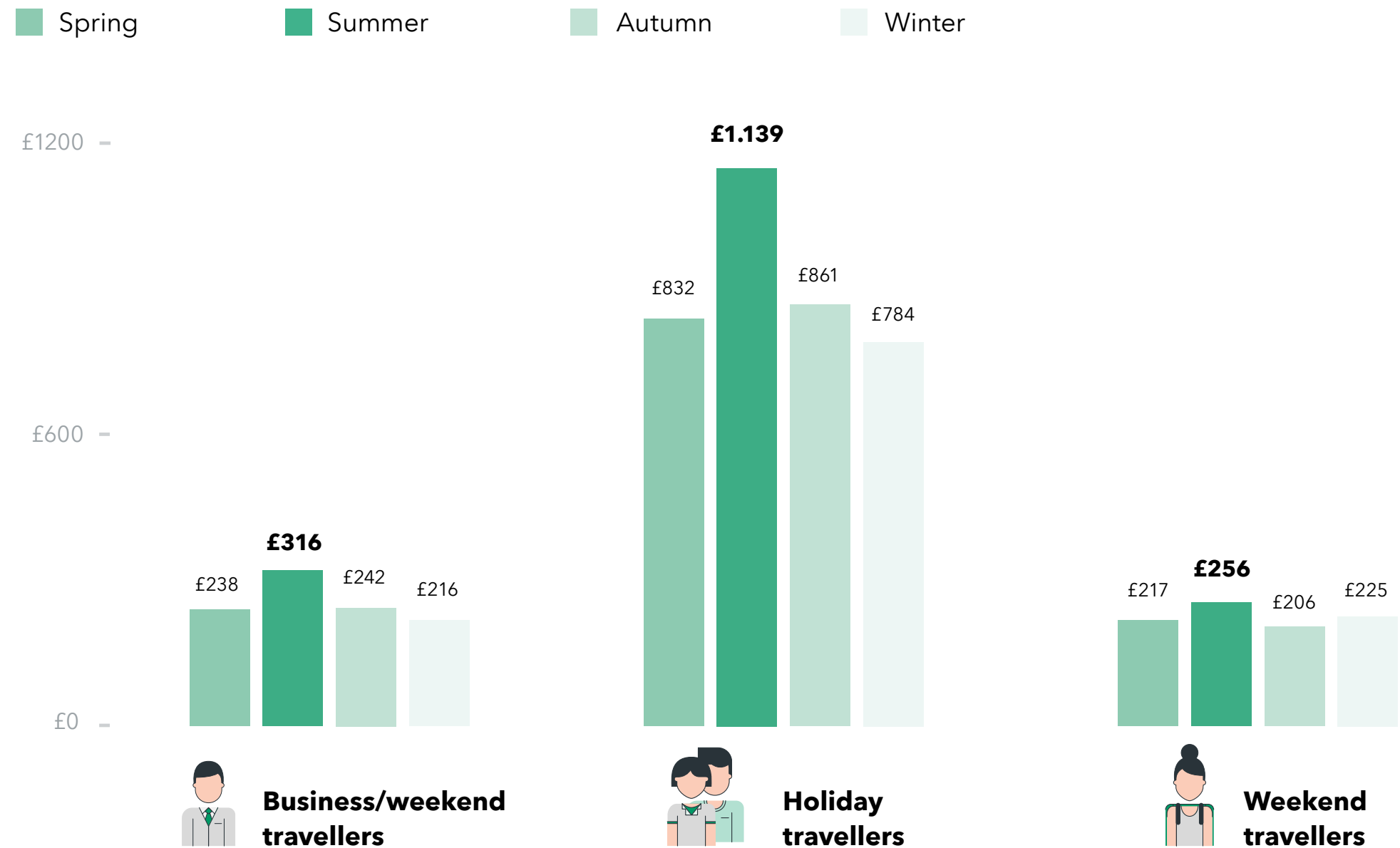
The average clicked price in summer is 21% higher than in autumn⁴.

The average searched price reaches its peak for all key markets in summer, whereas during autumn the prices drop below the yearly average.



⁴ The data is collated for hotel stays during the period of 1 December 2016 - 30 November 2017. The total average clicked price is calculated from all key markets and the seasons are defined as spring (March, April, May); summer (June, July, August); autumn (September, October, November); and winter (December, January, February).

How much are visitors to Scotland planning to spend per season?



Holiday travellers pay up to £1,139, on average, in total for their summer stay.

Average total basket value reveals how much travellers plan to spend for their whole hotel stay in Scotland. Holiday travellers, who stay more than six nights, capture the highest average total basket value per stay.

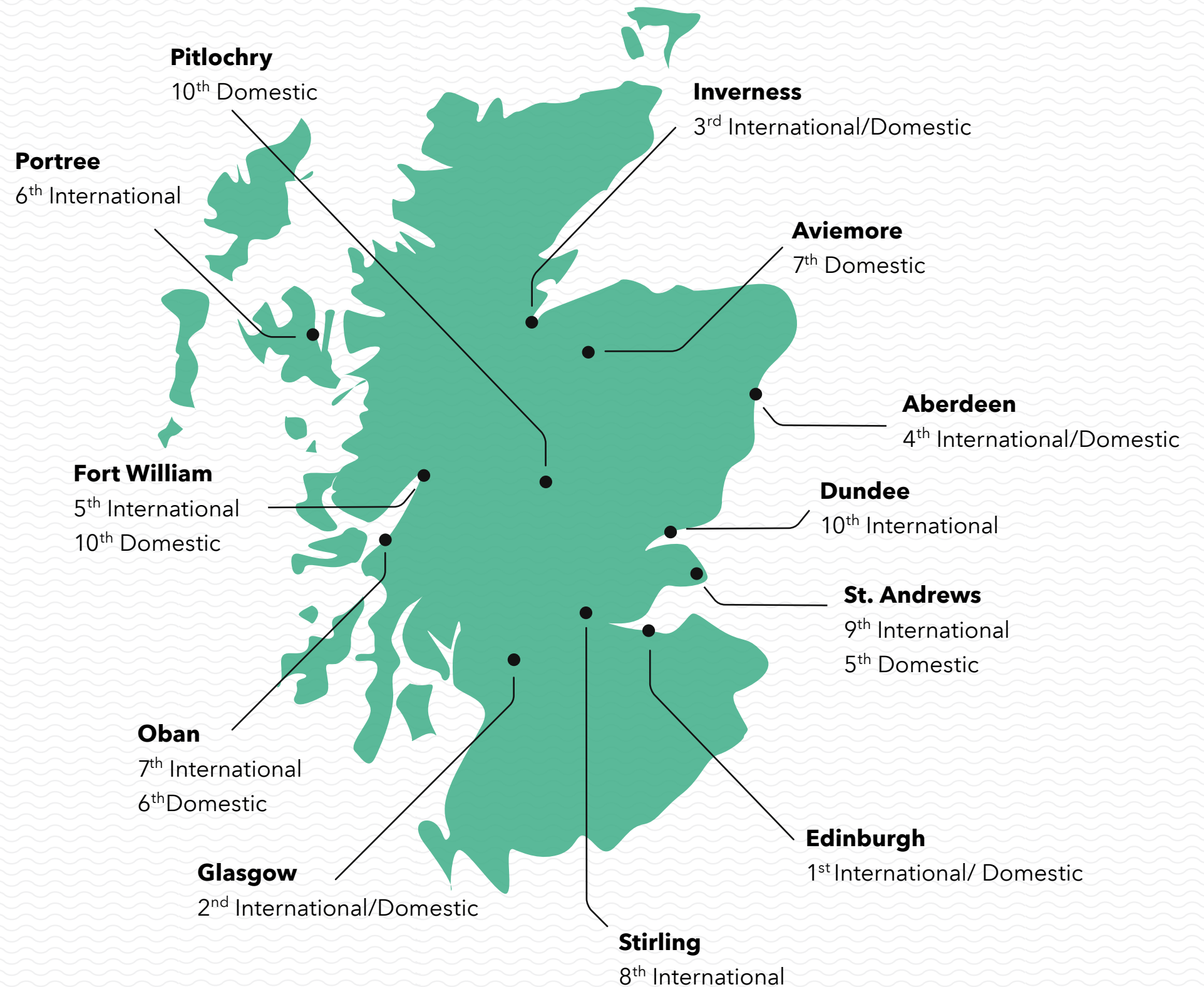
All three types of travellers pay the highest room-rates in summer, when the total basket value reaches its peak.

What are the most popular destinations in Scotland?

Edinburgh, Glasgow, Inverness and Aberdeen are the top four destinations for both domestic & international travellers

Big cities dominate the list of the most searched destinations. **Edinburgh accounts for 60% of all inbound searches to Scotland**, but just 37% of searches from domestic travellers.

Vying for 5th position are Fort William and St Andrews for international and local travellers respectively, conversely appearing in 9th and 10th position. The remaining destinations show some variations between international visitors and locals, with Portree and Stirling reaching the top for the former, in place of Aviemore and Pitlochry for the latter.



What is the seasonal traffic share of domestic & international travellers?

Visitors to Scotland plan their trips preferably in summer.

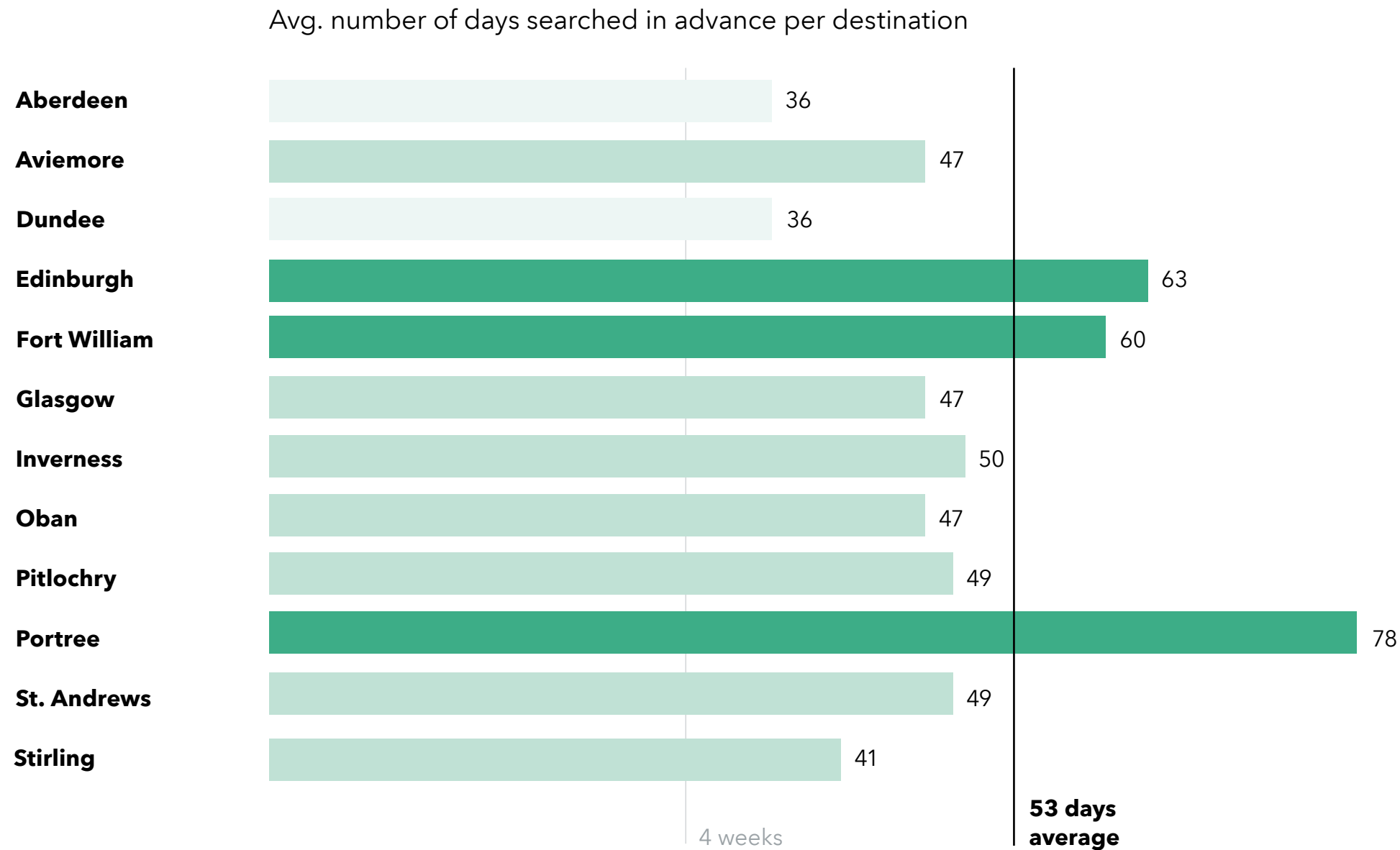
Summer is the most popular season for international travellers to visit Scotland, accounting for 42% of all searches per year. Approximately one quarter of inbound searches are for autumnal and spring visits, whereas winter captures only 12%.

While travellers from overseas prefer to stay during summer, domestic travellers plan their visits all year round with only a slight peak in summer.

Graph compares share of traffic per season, per traveller group. It does not represent a comparison of the overall share of traffic between domestic and international travellers (see page 4 for this information).



When do travellers search for a hotel stay?



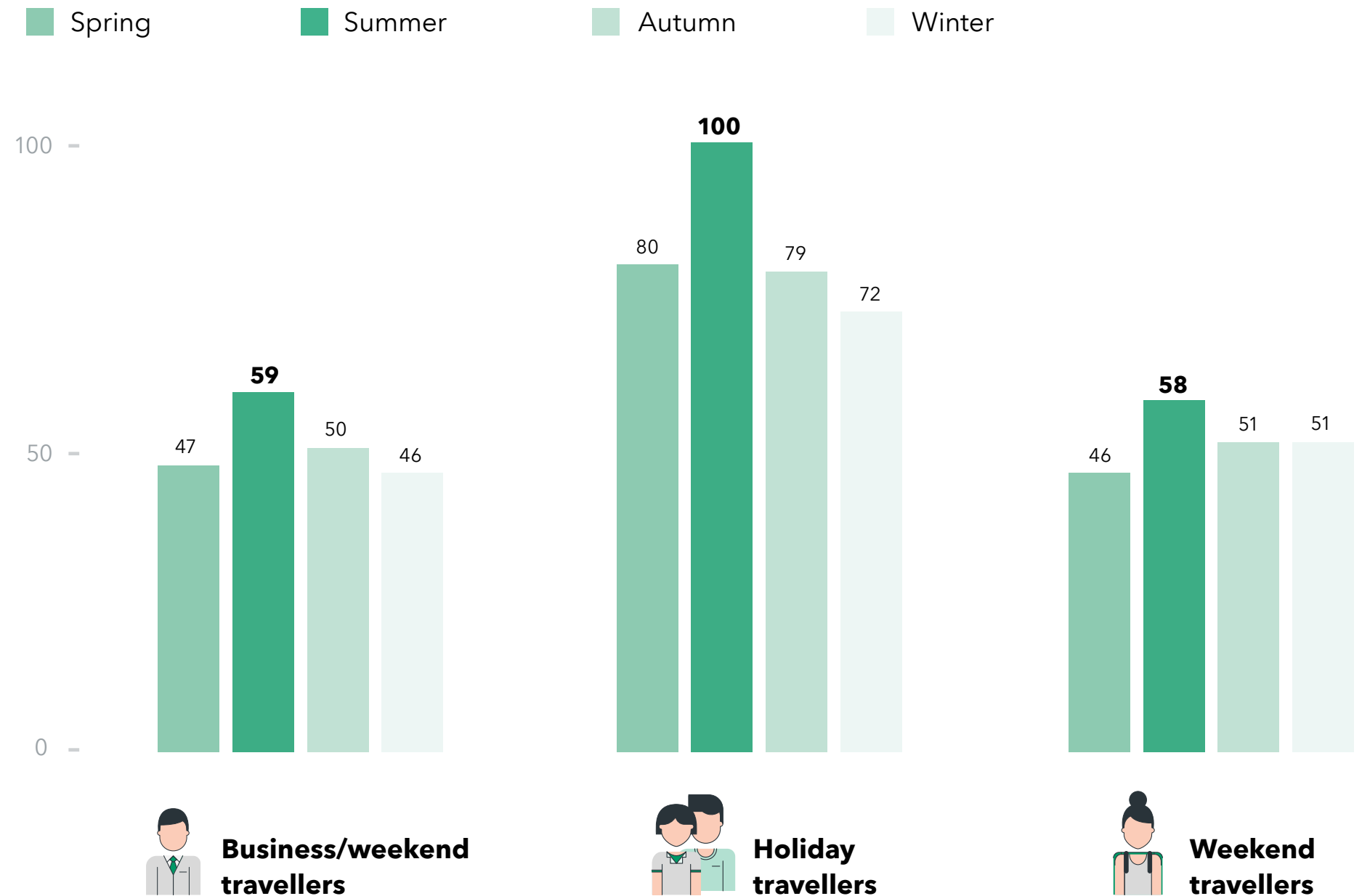
On average, travellers to destinations in Scotland search 53 days in advance.

Visitors to Portree plan their trip 11 weeks before their actual trip, whereas visitors to Aberdeen and Dundee plan only five weeks in advance.

When do different types of travellers plan their trip?

Holiday travellers search for a summer trip 100 days beforehand, on average.

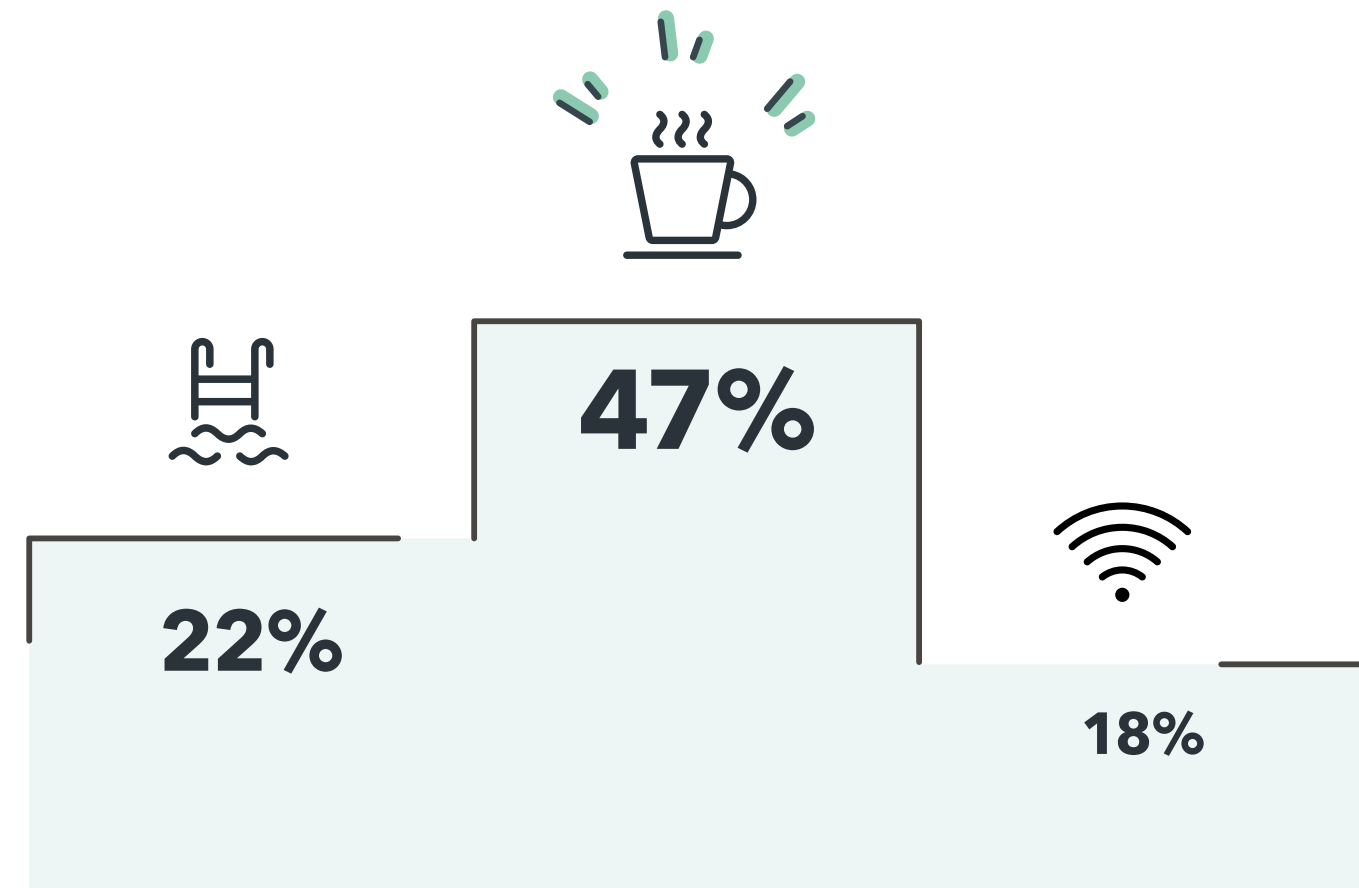
While weekend and business/weekday travellers search for a hotel seven weeks in advance on average, holiday travellers heading to Scotland for at least six nights, plan their stays approximately 12 weeks in advance. Regardless of the type of stay, travellers planning stays in summer, search for hotels farthest in advance.



What are the top 3 filters?

Breakfast is the most popular top filter, when searching for a hotel.

For 47% of all travellers that use the top filters, the breakfast offer is their first concern, which is 2% more than the National average⁵. The Pool and Wifi are the second and third most used filters.



⁵ [trivago Industry Insights Report: United Kingdom](#)

Harness the data and take action



Target guests based on where they come from and what type of traveller they are



Customise your content according to what travellers want

Set attractive & competitive prices to appeal to travellers' spending preferences



Get a competitive edge on trivago

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For further information about the report and webinars please contact Lenka Trckova.



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