

SCOTLAND VISITOR SURVEY 2023

BACKGROUND AND METHODOLOGY (6 SLIDES)

1. What were the research objectives for the study?
2. What were the main research methods adopted?

April 2024

Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023
- The sample comprises leisure overnight visitors only
- The data is weighted to reflect the profile of visitors to Scotland and its regions



Research objectives

To enhance understanding of overnight leisure tourism in Scotland

Business objectives

- Provide insights on visitor behaviour and experience of the Scottish tourism product post pandemic which will inform business and marketing planning
- Share relevant insights and support for regional tourism planning
- Enhance VisitScotland's reputation as an insight and knowledge leader to the tourism industry

Research objectives

- Understand the Scotland visitor experience for different visitor types and markets
- Discover the visitor journey in terms of the inspiration, planning and booking processes that visitors to Scotland undertake, including the use of intermediaries and digital technologies
- Understand the visitor experience and behaviour at a Scotland and an individual regional level (where sample size allows)
- Understand the impact of sustainable and responsible tourism on visitor's attitudes and behaviour
- Identify gaps or opportunities for development of the visitor experience or tourism product
- Identify overall satisfaction, recommendation and likelihood to return measures for Scotland and its individual regions

Methodology

Stage One: Face-to-face interviews with visitors

- Short face to face (F2F) interviews with visitors across Scotland
- Interviews conducted at 135 sampling points across 23 regions, from Shetland to the Scottish Borders
- All respondents were leisure overnight visitors
- Survey available in English plus five other languages
- Fieldwork period: March to October 2023
- Key profiling data collected, along with consent to received follow-up online survey by email
- Sample size of 11,572 achieved, with 8,887 agreeing to take part in online survey (77%)

Stage Two: Follow-up online survey

- A more detailed online survey was emailed to F2F respondents approximately 3 weeks after they had been interviewed
- Survey available in English plus five other languages
- Fieldwork: April to November 2023
- Survey covered full visitor journey, plus questions exploring satisfaction with various aspects of their trip
- Prize draw offered to encourage response.
- Sample size of 3,011 achieved (37% response rate)

Using and interpreting the Scotland Visit Survey 2023

- **The Scotland Visitor Survey should not be viewed in isolation**
- The survey collates views on a wide range of topics to understand visitor attitudes and behaviours
- This data supplements 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 undertaken during spring, summer and autumn seasons 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 March and October 2023 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. We also aimed to exclude large group tours from the research but individuals away from their group may have been interviewed
- Both face to face (stage 1) and online data (stage 2) were weighted to reflect the profile of visitors measured by the GBTS and the IPS. The F2F sample was weighted to reflect the split in visitors to Scotland between domestic (as measured by the GBTS) and international (as measured by the IPS)
- The online sample was weighted to reflect the spread of visitors to the 12 key regions across Scotland (based on GBTS data) and the split of domestic and international visitors within each region (based on IPS data). Some of the key tourism regions in Scotland were combined, resulting in 12 areas for weighting purposes. This was necessary due to small sample sizes in some regions. Large sample sizes are needed for robust and reliable data weighting. All weighting for the tourism areas used both GBTS and IPS data.



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