

SCOTLAND VISITOR SURVEY 2023

HIGHLIGHTS OF THE VISITOR EXPERIENCE IN SCOTLAND (16 SLIDES)

1. How did visitors rate their overall experience in Scotland in 2023?
2. How likely are visitors to recommend Scotland to friends and family?
3. How likely are visitors to return to Scotland in the future?
4. Agreement to specific statements (best holiday, wellbeing, welcoming, Gaelic)

April 2024

Contents

Highlights of the visitor experience in Scotland

Background

Summary

1. Overall rating of a holiday or short break in Scotland
2. Likelihood to recommend Scotland
3. Likelihood to return
4. Agreement to statement 'best holiday ever taken'
5. Impact on wellbeing
6. Welcoming destination
7. Finding out about Scottish Gaelic
8. Definitions

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



Summary:

Highlights of the visitor experience in Scotland

A separate section of the visitor survey will look at improvements to the visitor experience and ideas from visitors

In general, we find that visitors are very positive about their holiday or short break experiences, given the level of time, planning and cost they have invested to personalise their trip.

Nine and ten scores on a ten point scale (Top 2 box) show genuine satisfaction and can foster loyalty. The challenge is to enhance every visitor experience to encourage more people to give the highest score possible.

Whilst the survey is not a tracking survey, rating of experience has been asked consistently. We have seen a move upwards for those rating their experience as ten out of ten from 46% in 2016 to 48% in 2023.

The positive experience enjoyed by visitors has also resulted in a shift upwards in intention to recommend Scotland from 56% in 2016 to 67% in 2023 (extremely likely scores of 10 out of 10).

This positive level of experience has also led to a high likelihood to return with 62% of visitors stating they are very likely to take a holiday or short break in Scotland in the next five years. Going forward we can adapt to the latest trends and use new storytelling to ensure Scotland remains a 'must visit destination'.

1. How did visitors rate their holiday or short break experience in Scotland in 2023?

48%

of visitors rated their experience in Scotland as 10 out of 10

71%

of visitors rated their experience in Scotland as 9 or 10 out of 10



1.1 How did visitors rate their holiday or short break experience in Scotland in 2023?

Looking at different groups of visitors, we know that those who have a higher investment in a trip (perhaps linked to distance and cost) as well as those who are taking a holiday with a special meaning or 'trip of a lifetime' rate their experience highly

55%

of visitors who were on a 'trip of a lifetime' rated their experience as 10 out of 10

58%

of long haul visitors rated their experience as 10 out of 10

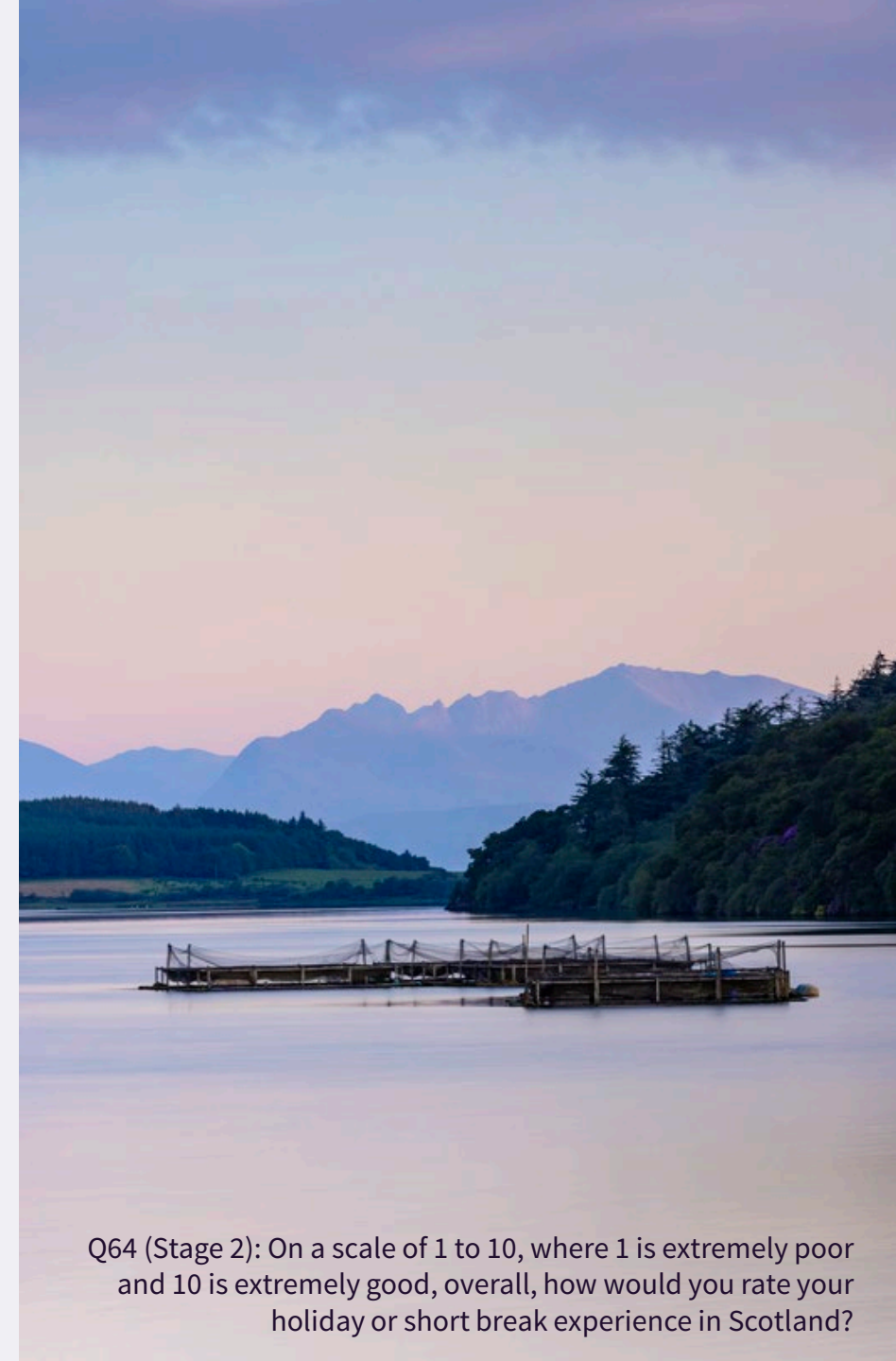
63%

of visitors from USA rated their experience as 10 out of 10

52%

of visitors who stayed in a rural location rated their experience as 10 out of 10

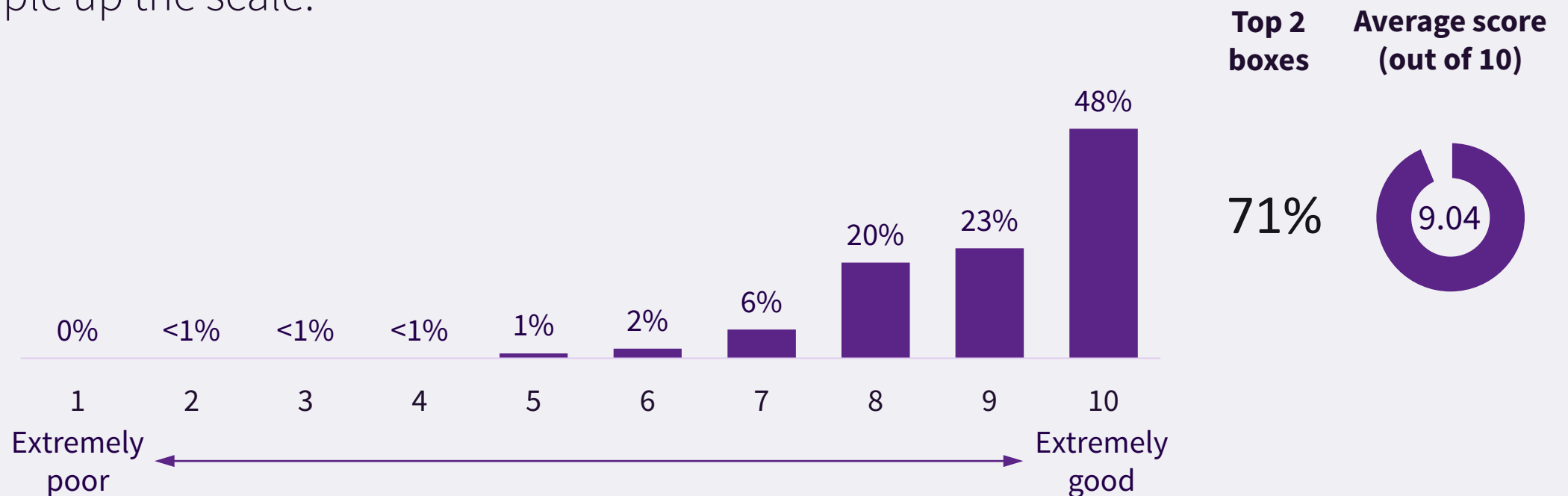
Base (All): 3,011



Q64 (Stage 2): On a scale of 1 to 10, where 1 is extremely poor and 10 is extremely good, overall, how would you rate your holiday or short break experience in Scotland?

1.2 Overall rating of holiday or short break in Scotland

Almost half of all visitors rated their holiday in Scotland as a perfect 10 out of 10 experience, while a further 23% rated it with a score of 9. The overall average score was 9 out of 10. Although sentiment is extremely positive there is an opportunity to continue to move people up the scale.



Hear from Scotland's Visitors



It was beautiful in Scotland and this trip there my heart fulfilled with joy and magic !!! Behind every curve was a new magical picture and no matter where we were, it was just nice! And people are so nice and helpful!

It truly was the trip of a lifetime. Can't say enough about it.



I love Scotland, it was a fantastic time. This was my first solo trip and I felt safe and secure and welcomed throughout the whole journey by everyone I met, which I found to be very encouraging as a woman travelling alone in a country I've never been to before.

Fantastic. People are welcoming, nature fascinating and culture rich and well organized in museums and historical sites. You are a fantastic people, in balance with nature and immersed in a fairytale landscape.



2. How likely are visitors to recommend Scotland to their friends and family?

67%

of visitors are extremely likely to recommend Scotland (10 out of 10)

82%

of visitors are likely to recommend Scotland (9 or 10 out of 10)

UK
visitors

81%

European
visitors

81%

Long haul
visitors

84%

Base (All): 3,011



Q66 (Stage 2): Based on your experiences during this trip, how likely or unlikely are you to recommend Scotland as a holiday or short break destination to friends and family?



3. How likely are visitors to return to Scotland in the next five years?

62%

of visitors state they are very likely to return to Scotland in the next five years

80%

of visitors are quite or very likely to return

UK
visitors

89%

European
visitors

71%

Long haul
visitors

46%

Base (All): 3,011



4. One of the best holidays ever taken

40%

of all visitors stated this was the best holiday they had ever taken (rating 9 or 10 out of 10)

UK
visitors

34%

European
visitors

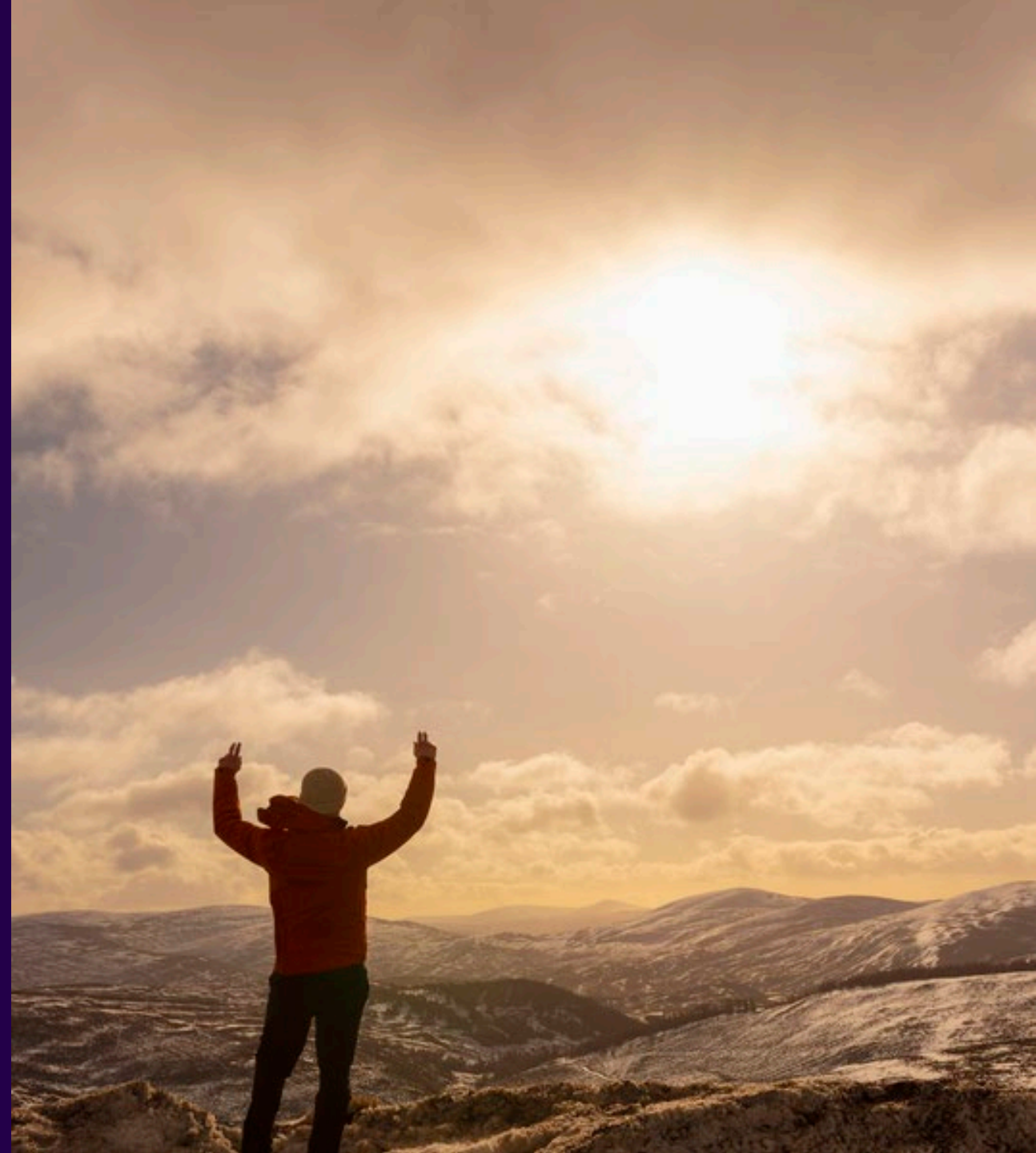
44%

Long haul
visitors

59%

Interpretation note:

Although the survey is not a tracking survey, this statement was also asked in the last visitor survey. We have seen a rise from 30% to 40% stating that the holiday was the best they had ever taken (9 or 10 out of 10)



5. Impact on wellbeing

59%

Of visitors agreed that their trip in Scotland enhanced their physical, mental and emotional wellbeing (9 or 10 out of 10)

UK
visitors

57%

European
visitors

57%

Long haul
visitors

65%

Base (All, excluding 'not applicable'): 2,367 – 3,004

Q61 (Stage 2): Thinking of your experience during your trip in Scotland overall, to what extent do you agree or disagree with the following statements



6. Welcoming destination

72%

Of visitors agreed that Scotland is an open and welcoming destination (9 or 10 out of 10)

UK
visitors

69%

European
visitors

76%

Long haul
visitors

85%

Base (All, excluding 'not applicable'): 2,367 – 3,004

Q61 (Stage 2): Thinking of your experience during your trip in Scotland overall, to what extent do you agree or disagree with the following statements





7. Finding out about Scottish Gaelic

28%

Of visitors agreed that finding out about the Scottish Gaelic language and culture really enhanced my visit (9 or 10 out of 10)

UK
visitors

20%

European
visitors

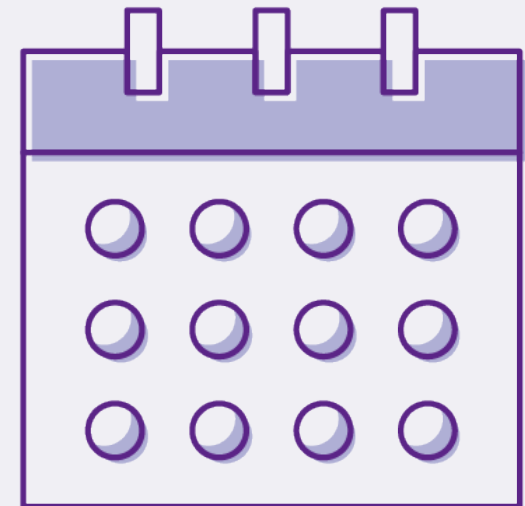
40%

Long haul
visitors

46%

8. Definitions used within this report

- Within this report, **the term visitor is used to refer to respondents to the survey**. Data has been weighted to reflect the profile of visitors to Scotland and its regions using the national statistical monitors (Great Britain Tourism Survey and International Passenger Survey). More detail is available within a separate Background and Methodology report
- **Within this report the following market definitions apply**
 - UK: respondents resident in Scotland or rest of the UK
 - Europe: respondents resident in Scotland's core markets of France, Germany, Spain, Italy, Netherlands and any other European country
 - Long haul: respondents resident in USA, Canada and Australasia
A rest of world category is also available on request
- **Within this report the following life stage definitions apply**
 - Pre nesters: respondents aged 16 to 34 with no children
 - Families: respondents aged 16 to 64 with children in the travel party
 - Older independents: respondents aged 35 to 64 with no children
 - Retirement age: respondents aged 65 and over





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April 2024