

SCOTLAND VISITOR SURVEY 2015 & 2016

Introduction

The Scotland Visitor Survey was carried out by Jump Research for VisitScotland to enhance understanding of visitor behaviour and the visitor experience in Scotland. 11,743 leisure overnight visitors were interviewed in Scotland between May and September 2015 and 2016. 2,999 responded to a follow-up online survey on their return home. **887** visitors were interviewed in Aberdeen and Aberdeenshire and **193** visitors answered specific questions about their visit to the area via the follow-up online survey.



Union Terrace Gardens, Aberdeen

Volume and Value

The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region. To provide this wider context and to provide an overview of tourism to the area, the following data is sourced from the 2015 GB Tourism Survey and International Passenger Survey (latest available at time of publication). These figures are for the full year Jan-Dec 2015:

Aberdeen and Aberdeenshire (2015)

1,339,000 overnight visits

78% domestic visits

22% overseas visits

Top overseas markets: **Germany, USA, France, Italy**

£421m total visitor spend



What attracted visitors to come...

Aberdeen and Aberdeenshire (top 10)

Base	193
1 The scenery & landscape	50%
2 To visit family / friends who live there	45%
3 The history & culture	36%
4 Holidayed here before and wanted to return	33%
5 A place I have always wanted to visit	27%
6 To get away from it all	25%
7 It is easy to get to	21%
8 To visit a particular attraction	19%
9 To visit cities	19%
10 Its reputation for friendly people	16%

Scotland (top 10)

Base	11743
1 The scenery & landscape	50%
2 The history & culture	33%
3 Holidayed here before and wanted to return	24%
4 To get away from it all	23%
5 To visit family / friends who live there	20%
6 It is easy to get to	16%
7 Closeness to home	15%
8 Its reputation for friendly people	15%
9 To visit cities	15%
10 A place I have always wanted to visit	15%

Whilst the scenery and landscape was the top motivation to visit, 45% were in the area visiting family or friends – the highest proportion of any area in Scotland. Correspondingly, a third cited the fact they had visited the area previously and wanted to return as a motivation for this trip. History and culture were a draw for more than a third of visitors to Aberdeen and Aberdeenshire.



Activities undertaken

Aberdeen and Aberdeenshire (top 10)

	Base	193
1	Sightseeing by car / coach / on foot	78%
2	Visited a historic house, stately home, castle	66%
3	Short walk, stroll	55%
4	Shopping	46%
5	Visited a country park / garden	45%
6	Visited cities	45%
7	Centre based walking	44%
8	Visited a beach	40%
9	Visited a cathedral, church, abbey, other religious building	38%
10	Visited a museum / art gallery	37%

Scotland (top 10)

	Base	2999
1	Sightseeing by car / coach / on foot	74%
2	Visited a historic house, stately home, castle	60%
3	Short walk / stroll	54%
4	Shopping	46%
5	Visited a cathedral, church, abbey, other religious building	46%
6	Visited a museum / art gallery	45%
7	Centre based walking	45%
8	Visited a country park / garden	43%
9	Visited cities	42%
10	Long walk, hike, ramble	38%

The most popular activities on overnight visits to Aberdeen and Aberdeenshire were sightseeing, visiting castles, historic houses or stately homes, and taking short walks or strolls.

Visitors to Aberdeen and Aberdeenshire were slightly more likely to go sightseeing and to visit a castle, historic house or stately home than the average visitor to Scotland.

Visitors to the area were more likely to mention genealogy as an activity (5%) than other areas of Scotland.



Type of accommodation stayed in

Aberdeen and Aberdeenshire (top 5)

	Base	193
1	Hotel	49%
2	Friends / family	23%
3	Self-catering	15%
4	B&B / Guest House / Restaurant with Rooms	13%
5	Touring caravan / motorhome	7%

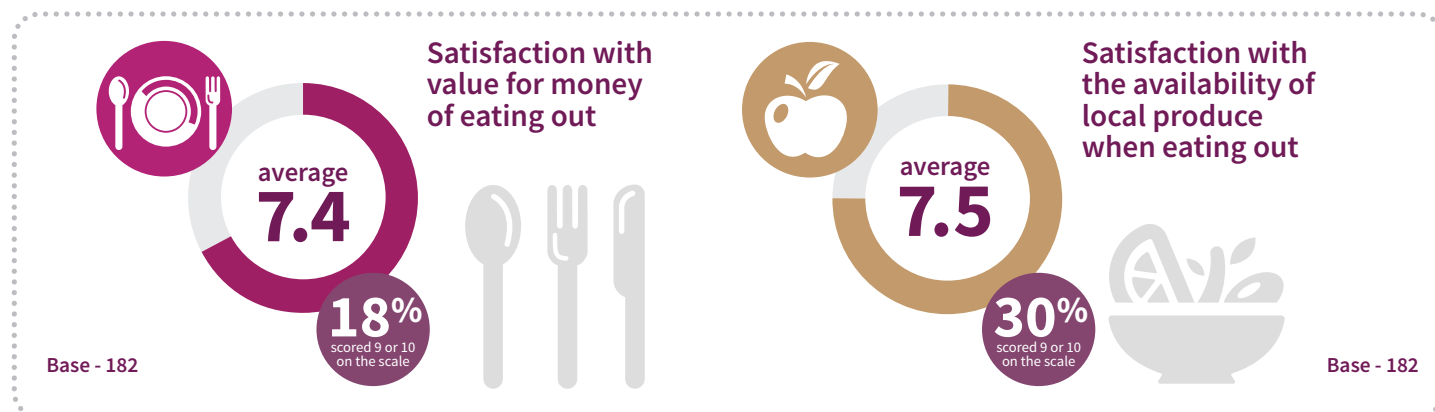
Scotland (top 5)

	Base	2999
1	Hotel	41%
2	Self-catering	22%
3	B&B / Guest House / Restaurant with Rooms	20%
4	Friends / family	19%
5	Camping	6%

Almost half of visitors stayed in hotels in Aberdeen and Aberdeenshire, a slightly higher proportion than in other areas of Scotland, resulting in a slightly lower proportion staying in Guest Houses, B&Bs or self-catering properties in this area.

Visitors were asked to rate various aspects of their visitor experience in Aberdeen and Aberdeenshire on a scale of 1 to 10 (with 1 being extremely dissatisfied through to 10 as extremely satisfied).

Visitors to Aberdeen and Aberdeenshire were positive about their experience, giving average scores of over 7 out of 10 on each measure. Ease of getting around the area scored highest at 8.3 whilst availability of free Wi-Fi at accommodation recorded the lowest satisfaction score. Areas of focus relate to eating out, as satisfaction with value for money and availability of local produce were lower than other aspects of the visitor experience.





Your overall experience?



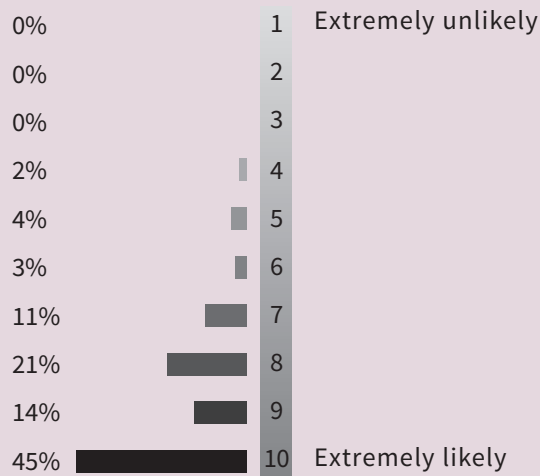
Base - 193

53%
scored 9 or 10
on the scale

average
8.6



How likely are you to recommend?



Base - 193

59%
scored 9 or 10
on the scale

average
8.6



Visitors to Aberdeen and Aberdeenshire gave positive ratings of their experience with 93% giving scores of 7-10 on the satisfaction scale. 53% gave the highest ratings of 9 or 10 out of 10 indicating the top level of satisfaction with their trip. These Top 2 scores (9 or 10 out of 10) show genuine satisfaction and can foster loyalty. The challenge is to continue to improve the visitor experience to encourage more visitors to tick these high end scores on the satisfaction scale.

Visitors expressed a high likelihood to recommend the area as a holiday destination to friends or family. 91% scored 7-10 on the scale with 59% selecting the top 2 scores (9 or 10 out of 10) indicating a high level of likelihood to recommend.

Appendix Using and interpreting the Scotland Visitor Survey

- **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
- For further information and notes on this data please see the Tourism in Scotland and Tourism in Scotland's Regions fact sheets available within the Research & Statistics section of our corporate website http://www.visitscotland.org/research_and_statistics.aspx
- The Scotland Visitor Survey is undertaken during the main season 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 May and September 2015 and 2016 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.
- The base size refers to the unweighted base.