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.

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)

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<tr>
<th>Base</th>
<th>193</th>
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<tbody>
<tr>
<td>1</td>
<td>The scenery &amp; landscape</td>
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<tr>
<td>2</td>
<td>To visit family / friends who live there</td>
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<td>3</td>
<td>The history &amp; culture</td>
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<td>4</td>
<td>Holidayed here before and wanted to return</td>
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<tr>
<td>5</td>
<td>A place I have always wanted to visit</td>
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<tr>
<td>6</td>
<td>To get away from it all</td>
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<tr>
<td>7</td>
<td>It is easy to get to</td>
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<tr>
<td>8</td>
<td>To visit a particular attraction</td>
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<td>9</td>
<td>To visit cities</td>
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<tr>
<td>10</td>
<td>Its reputation for friendly people</td>
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Scotland (top 10)

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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.
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.
Overall Experience Aberdeen and Aberdeenshire

Your overall experience?

- Extremely poor: 0%
- Extremely unlikely: 0%
- Extremely unlikely: 0%
- Extremely unlikely: 0%
- Very unlikely: 0%
- Unlikely: 1%
- Not very likely: 3%
- Not very likely: 3%
- Likely: 30%
- Likely: 19%
- Very likely: 34%
- Extremely likely: 30%

How likely are you to recommend?

- Extremely poor: 0%
- Extremely unlikely: 0%
- Extremely unlikely: 0%
- Extremely unlikely: 0%
- Very unlikely: 2%
- Unlikely: 4%
- Not very likely: 3%
- Not very likely: 11%
- Likely: 21%
- Likely: 14%
- Very likely: 45%
- Extremely likely: 59%

Base - 193
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.