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.

Full details of the research objectives, methodology and technical appendix are available within the Background and Methodology report.
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

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

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

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.

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?

Base (All): 3,011
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.

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?
Hear from Scotland’s Visitors

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.

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.
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)

81% UK visitors
81% European visitors
84% Long haul visitors

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? Base (All): 3,011
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.

<table>
<thead>
<tr>
<th>Visitor Type</th>
<th>Likelihood</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK visitors</td>
<td>89%</td>
</tr>
<tr>
<td>European visitors</td>
<td>71%</td>
</tr>
<tr>
<td>Long haul visitors</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base (All): 3,011

Q68 (Stage 2): How likely or unlikely are you to take a holiday or short break in Scotland in the next five years?
4. One of the best holidays ever taken

<table>
<thead>
<tr>
<th></th>
<th>UK visitors</th>
<th>European visitors</th>
<th>Long haul visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>34%</td>
<td>44%</td>
<td>59%</td>
</tr>
</tbody>
</table>

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

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)

<table>
<thead>
<tr>
<th>UK visitors</th>
<th>European visitors</th>
<th>Long haul visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>69%</td>
<td>76%</td>
<td>85%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th></th>
<th>UK visitors</th>
<th>European visitors</th>
<th>Long haul visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>20%</td>
<td>40%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base (All, excluding ‘not applicable’): 2,367 – 3,004
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
Disclaimer:
This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.

Contact Us:
Insight Department
visitscotland.com
Visitscotland.org
research@visitscotland.com
Images © VisitScotland

April 2024