Introduction

The Scotland Visitor Survey was conducted by Progressive Partnership on behalf of VisitScotland to enhance understanding of visitor behaviour and experience in Scotland. In total, 11,573 visitors were interviewed in Scotland between March and October 2023, with 3,011 responding to an online survey on their return home.

Overall, 1041 overnight visitors to the Highlands (excluding Inverness) completed the online survey. The results shown below are based on these visitors to the Highlands. Results for visitors to Inverness are shown in a separate factsheet.

Profile of overnight visitors to the Highlands

47% Domestic visitors
- 12% Scotland (residents)
- 35% Rest of UK

53% International visitors
- 22% Europe
- 30% Long haul including:
  - 22% North America
  - 7% Australasia
  - 1% Rest of World

Average number in travel party: 2.6
Children (under 16) in party: 13%

Life Stage
- Pre-nesters: 13%
- Families: 12%
- Older Independents: 48%
- Retirement Age: 27%

Profile of trip

Highlands visitors stayed on average 11.2 nights in total in Scotland including 4.1 nights in Highlands

85% of visitors to Highlands toured around Scotland, staying in two or more places

First time visitor: 37%
Repeat visitor: 63%
Average proportion of first-time visitors to Scotland: 25% (Scotland-wide sample)

Examples of Type of Trip
- A trip of a lifetime: 15%
- A special holiday/short break: 28%
Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Highlands sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>85%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>59%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>40%</td>
</tr>
<tr>
<td>4</td>
<td>Scotland’s people</td>
<td>27%</td>
</tr>
<tr>
<td>5</td>
<td>A Scottish attraction</td>
<td>20%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>18%</td>
</tr>
<tr>
<td>7</td>
<td>Visiting friends or family</td>
<td>17%</td>
</tr>
<tr>
<td>8</td>
<td>Scotland’s food and drink</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<td>A particular experience found in Scotland</td>
<td>11%</td>
</tr>
<tr>
<td>10</td>
<td>It’s easy to get to or close to home</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All visitors to Highlands (stage 2) 1,041

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<td>It’s easy to get to or close to home</td>
<td>15%</td>
</tr>
<tr>
<td>10</td>
<td>An event or festival</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All visitors to Scotland (stage 2) 3,011

Type of accommodation used in the Highlands

50% stayed in serviced accommodation

- 34% Hotel, motel, inn
- 19% Guest house, B&B
- 4% Hostel

60% stayed in non-serviced accommodation

- 29% Self-catering/commercial non-serviced rentals
- 26% Camping, caravan, motorhome
- 4% Friend’s or relative’s home

Base: Stage 2 Highlands visitors (priority region) 590
Note: serviced and non-serviced adds to more than 100% due to some people staying in more than one accommodation type.

Satisfaction with accommodation in the Highlands

**Satisfaction with...** (Scored out of 10)

- **Overall welcome provided to you**
  - Average 8.78
  - 64% 9 or 10 out of 10
  - Scotland-wide sample 62% (9 or 10 out of 10)

- **The knowledge of staff/host (at accommodation) about things to do in the area**
  - Average 8.49
  - 53% 9 or 10 out of 10
  - Scotland-wide sample 53% (9 or 10 out of 10)

- **The value for money of accommodation**
  - Average 7.78
  - 35% 9 or 10 out of 10
  - Scotland-wide sample 42% (9 or 10 out of 10)

Base: Stage 2 Highlands visitors in paid for accommodation excl. n/a 850 - 985
## Attractions and activities undertaken in Highlands

### Top 5 attractions or activities undertaken/visited in Highlands

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Highlands</th>
<th>Highlands sample</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hill walk, mountaineering, hike, ramble</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>2</td>
<td>A castle or fort</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>3</td>
<td>A nature reserve</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>4</td>
<td>A visitor or heritage centre</td>
<td>32%</td>
<td>49%</td>
</tr>
<tr>
<td>5</td>
<td>Shopping</td>
<td>31%</td>
<td>47%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in Highlands 584*

### Satisfaction with attractions in Highlands

#### Satisfaction with... (Scored out of 10)

<table>
<thead>
<tr>
<th>Knowledge and passion of the staff at attractions</th>
<th>Average 8.81</th>
<th>64% 9 or 10 out of 10</th>
<th>Scotland-wide sample 64% (9 or 10 out of 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of experience at attractions</td>
<td>Average 8.72</td>
<td>60% 9 or 10 out of 10</td>
<td>Scotland-wide sample 57% (9 or 10 out of 10)</td>
</tr>
<tr>
<td>Value for money of paid for attractions</td>
<td>Average 8.21</td>
<td>43% 9 or 10 out of 10</td>
<td>Scotland-wide sample 47% (9 or 10 out of 10)</td>
</tr>
</tbody>
</table>

*Base: Stage 2 Took part in activities/attractions in Highlands excl. n/a 522-547*
Food and drink experiences in Highlands

26% took part in food and/or drink experiences in Highlands

Key food and drink experiences included:
- 14% visited a farm shop/farmers market
- 8% visited a fine dining restaurant
- 2% undertook a food or drink activity e.g. cookery class

Base: Stage 2 Took part in activities/attractions in Highlands 584

Satisfaction with food and drink experiences in Highlands

Satisfaction with……. (Scored out of 10)

The service provided by staff
- Average 8.48
- 51% 9 or 10 out of 10
- Scotland-wide sample 55%

The quality of food and drink available
- Average 8.11
- 43% 9 or 10 out of 10
- Scotland-wide sample 48%

The availability of local produce when eating out
- Average 7.83
- 35% 9 or 10 out of 10
- Scotland-wide sample 37%

The value for money of eating out
- Average 7.54
- 30% 9 or 10 out of 10
- Scotland-wide sample 32%

Base: Stage 2 Highlands visitors excl. n/a 977-1026

Overall experience and likelihood to recommend Highlands

Positive rating of holiday/short break experience
(9 or 10 out of 10)
- 71% Highlands
- 71% for Scotland overall (Scotland-wide sample)

Likelihood to recommend as a holiday/short break destination
(9 or 10 out of 10)
- 82% Highlands
- 82% for Scotland overall (Scotland-wide sample)

Base: Stage 2 Highlands visitors (priority region) 590
Appendix: Interpreting the results

- 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.
- The base size varies across questions. Visitors could have stayed in multiple locations, therefore the questionnaire was designed to ask specific questions about accommodation and satisfaction with their experience overall in up to two priority regions. Where the base size of 1041 is used this includes all visitors who stayed in Highlands during their trip. Where the base size is 590 this shows results for the visitors who were allocated Highlands as their priority region and were asked more detailed questions. The base size refers to the unweighted base.
- Figures may not always add to 100% as this may be due to rounding within the data analysis or where respondents have answered more than one category.
- The following questionnaire wording was used to describe the area: Highlands and Isle of Skye (including Aviemore, Fort William, The Cairngorms)
- Both face-to-face and online data were weighted to reflect the profile of visitors measured by the GBTS and the IPS. The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region.
- Browse our [Scotland Visitor Survey page](https://visitscotland.org) on visitscotland.org for more information on this survey.

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