Scotland Visitor Survey 2023

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, 717 overnight visitors to Inverness completed the online survey. The results shown below are based on these visitors to Inverness.

Profile of overnight visitors to Inverness

- **34% Domestic visitors**
  - 4% Scotland (residents)
  - 30% Rest of UK

- **66% International visitors**
  - 23% Europe
  - 40% Long haul including:
    - 30% North America
    - 10% Australasia
    - 3% Rest of World

- **Average number in travel party:** 2.6
- **Children (under 16) in party:** 9%

Profile of trip

- Inverness visitors stayed on average 10.7 nights in total in Scotland including 2.3 nights in Inverness
- **92% of visitors to Inverness toured around Scotland, staying in two or more places**

- **First time visitor:** 50%
- **Repeat visitor:** 50%

Examples of Type of Trip

- A trip of a lifetime: 19%
- A special holiday/short break: 31%

Base:
- Stage 2 online survey Inverness visitors 717
- Stage 2 Inverness visitors excluding n/a 708
- Stage 2 online survey Inverness visitors 717
- Stage 2 Inverness visitors excluding Scotland residents 697
Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Inverness sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>84%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>69%</td>
</tr>
<tr>
<td>3</td>
<td>Scotland’s people</td>
<td>30%</td>
</tr>
<tr>
<td>4</td>
<td>Outdoor activities available</td>
<td>29%</td>
</tr>
<tr>
<td>5</td>
<td>My or my family’s Scottish ancestry</td>
<td>24%</td>
</tr>
<tr>
<td>6</td>
<td>A Scottish attraction</td>
<td>24%</td>
</tr>
<tr>
<td>7</td>
<td>Scotland’s food and drink</td>
<td>18%</td>
</tr>
<tr>
<td>8</td>
<td>Visiting friends or family</td>
<td>14%</td>
</tr>
<tr>
<td>9</td>
<td>A particular experience found in Scotland</td>
<td>14%</td>
</tr>
<tr>
<td>10</td>
<td>A story or legend about Scotland</td>
<td>14%</td>
</tr>
</tbody>
</table>

Note: serviced and non-serviced adds to more than 100% due to some people staying in more than one accommodation type.

Type of accommodation used in Inverness

- **75% stayed in serviced accommodation**
  - 54% Hotel, motel, inn
  - 13% Guest house, B&B
  - 7% Hostel

- **28% stayed in non-serviced accommodation**
  - 23% Self-catering/commercial non-serviced rentals
  - 4% Camping, caravan, motorhome
  - 2% Friend’s or relative’s home

Satisfaction with accommodation in Inverness

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

- **Average 8.75**
  - Overall welcome provided to you
  - 64% 9 or 10 out of 10

- **Average 8.54**
  - The knowledge of staff/host (at accommodation) about things to do in the area
  - 53% 9 or 10 out of 10

- **Average 7.79**
  - The value for money of accommodation
  - 35% 9 or 10 out of 10

Scotland-wide sample 62% (9 or 10 out of 10)
Scotland-wide sample 53% (9 or 10 out of 10)
Scotland-wide sample 42% (9 or 10 out of 10)

Base: Stage 2 Inverness visitors in paid for accommodation excl. n/a 632-706
Top 5 attractions or activities undertaken/visited in Inverness

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Inverness</th>
<th>Inverness sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>43%</td>
</tr>
<tr>
<td>2</td>
<td>Shopping</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>Viewed architecture and buildings</td>
<td>35%</td>
</tr>
<tr>
<td>4</td>
<td>A cathedral, church, abbey or other place of worship</td>
<td>35%</td>
</tr>
<tr>
<td>5</td>
<td>A museum or art gallery</td>
<td>33%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Inverness

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Scotland</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>59%</td>
</tr>
<tr>
<td>2</td>
<td>Viewed architecture and buildings</td>
<td>52%</td>
</tr>
<tr>
<td>3</td>
<td>A museum or art gallery</td>
<td>50%</td>
</tr>
<tr>
<td>4</td>
<td>A historic house, palace, stately home</td>
<td>49%</td>
</tr>
<tr>
<td>5</td>
<td>Shopping</td>
<td>47%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Scotland

Satisfaction with attractions in Inverness

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions: Average 8.92 (Scotland-wide sample 64% (9 or 10 out of 10))

Quality of experience at attractions: Average 8.62 (Scotland-wide sample 57% (9 or 10 out of 10))

Value for money of paid for attractions: Average 8.28 (Scotland-wide sample 47% (9 or 10 out of 10))

Food and drink experiences in Inverness

21% took part in food and/or drink experiences in Inverness

Key food and drink experiences included:
- 8% visited a fine dining restaurant
- 4% undertook a food or drink activity e.g. cookery class
- 4% visited a farm shop/farmers market

Base: Stage 2 Took part in activities/attractions in Inverness 291
Satisfaction with food and drink experiences in Inverness

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

<table>
<thead>
<tr>
<th>Service Provided by Staff</th>
<th>Quality of Food and Drink Available</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average 8.61</strong></td>
<td><strong>Average 8.23</strong></td>
</tr>
<tr>
<td>55% Scotland-wide sample 55%</td>
<td>45% Scotland-wide sample 48%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Availability of Local Produce when Eating Out</th>
<th>Value for Money of Eating Out</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average 7.99</strong></td>
<td><strong>Average 7.59</strong></td>
</tr>
<tr>
<td>39% Scotland-wide sample 37%</td>
<td>31% Scotland-wide sample 32%</td>
</tr>
</tbody>
</table>

**Overall experience and likelihood to recommend Inverness**

<table>
<thead>
<tr>
<th>Positive Rating of Holiday/Short Break Experience</th>
<th>Likelihood to Recommend as a Holiday/Short Break Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>52% Inverness</strong></td>
<td><strong>59% Inverness</strong></td>
</tr>
<tr>
<td>71% for Scotland overall (Scotland-wide sample)</td>
<td>82% for Scotland overall (Scotland-wide sample)</td>
</tr>
</tbody>
</table>

*Base: Stage 2 Inverness visitors excl. n/a 685-707*
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 717 is used this includes all visitors who stayed in Inverness during their trip. Where the base size is 306 this shows results for the visitors who were allocated Inverness as their priority region 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.
- 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 on visitscotland.org for more information on this survey.

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