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, 132 overnight visitors to the Lothians (excluding Edinburgh) completed the online survey. The results shown below are based on these visitors to the Lothians. Results for visitors to Edinburgh are shown in a separate factsheet.

Profile of overnight visitors to the Lothians

63% Domestic visitors

- 11% Scotland (residents)
- 52% Rest of UK

37% International visitors

- 17% Europe
  - 20% Long haul including:
    - 13% North America
    - 7% Australasia

Average number in travel party: 2.5
Children (under 16) in party: 16%

Life Stage

- Pre-nesters: 7%
- Families: 14%
- Older Independents: 52%
- Retirement Age: 27%

Profile of trip

Lothians visitors stayed on average 10.1 nights in total in Scotland including 3.8 nights in the Lothians.

- 20% of visitors to the Lothians stayed in a single coastal location. (i.e. did not stay elsewhere)

First time visitor: 24%
Repeat visitor: 76%

Average proportion of first-time visitors to Scotland: 25% (Scotland-wide sample)

Examples of Type of Trip

- A trip of a lifetime: 13%
- A special holiday/short break: 13%
Local Area Factsheet: Lothians

Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Lothians sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>73%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>46%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>37%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>29%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>21%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>18%</td>
</tr>
<tr>
<td>7</td>
<td>A Scottish attraction</td>
<td>17%</td>
</tr>
<tr>
<td>8</td>
<td>A personal event</td>
<td>14%</td>
</tr>
<tr>
<td>9</td>
<td>Scotland’s food and drink</td>
<td>13%</td>
</tr>
<tr>
<td>10</td>
<td>It’s easy to get to or close to home</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: All visitors to Lothians (stage 2 online survey) 132

Type of accommodation used in the Lothians

- **46%** stayed in serviced accommodation
  - 31% Hotel, motel, inn
  - 15% Guest house, B&B
  - 5% Serviced apartment

- **60%** stayed in non-serviced accommodation
  - 25% Self-catering/commercial non-serviced rentals
  - 31% Camping, caravan, motorhome
  - 7% Friend’s or relative’s home

Base: Stage 2 online survey Lothians visitors (priority region) 114
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 Lothians

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

- **Overall welcome provided to you**
  - Average 8.90
  - 67% 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 8.82
  - 56% 9 or 10 out of 10
  - Scotland-wide sample 53% (9 or 10 out of 10)

- **The value for money of accommodation**
  - Average 7.84
  - 41% 9 or 10 out of 10
  - Scotland-wide sample 42% (9 or 10 out of 10)

Base: Stage 2 online survey Lothians visitors in paid for accommodation excl. n/a 96-118
Attractions and activities undertaken in the Lothians

Top 5 attractions or activities undertaken/visited in the Lothians

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in the Lothians</th>
<th>Lothians sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>44%</td>
</tr>
<tr>
<td>2</td>
<td>Viewed architecture and buildings</td>
<td>29%</td>
</tr>
<tr>
<td>3</td>
<td>Hill walk, mountaineering, hike or ramble</td>
<td>29%</td>
</tr>
<tr>
<td>4</td>
<td>A cathedral, church, abbey or other place of worship</td>
<td>28%</td>
</tr>
<tr>
<td>5</td>
<td>Shopping</td>
<td>27%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractons in the Lothians

<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/attractons in Scotland

Satisfaction with attractions in the Lothians

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions  Average 9.01

Quality of experience at attractions  Average 8.71

Value for money of paid for attractions  Average 8.49

Scotland-wide sample 64% (9 or 10 out of 10)

Scotland-wide sample 57% (9 or 10 out of 10)

Scotland-wide sample 47% (9 or 10 out of 10)

Base: Stage2 online survey Took part in activities/attractons in the Lothians exl. n/a 99-101

Food and drink experiences in the Lothians

26% took part in food and/or drink experiences in the Lothians

Key food and drink experiences included:
- 11% visited a farm shop/farmer market
- 7% visited a fine dining restaurant
- 2% visited a food or drink event or festival

Base: Stage2 online survey Took part in activities/attractons in the Lothians 110
Satisfaction with food and drink experiences in the Lothians

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

- **The service provided by staff**
  - Average: 8.54
  - 56% 9 or 10 out of 10
  - Scotland-wide sample 55%

- **The quality of food and drink available**
  - Average: 8.05
  - 43% 9 or 10 out of 10
  - Scotland-wide sample 48%

- **The availability of local produce when eating out**
  - Average: 7.99
  - 34% 9 or 10 out of 10
  - Scotland-wide sample 37%

- **The value for money of eating out**
  - Average: 7.66
  - 34% 9 or 10 out of 10
  - Scotland-wide sample 32%

*Base: Stage 2 online survey Lothians visitors excl. n/a*

**Overall experience and likelihood to recommend the Lothians**

- **Positive rating of holiday/short break experience**
  - (9 or 10 out of 10)
  - 64% Lothians
  - 71% for Scotland overall (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - (9 or 10 out of 10)
  - 69% Lothians
  - 82% for Scotland overall (Scotland-wide sample)

*Base: Stage 2 online survey Lothians visitors (priority region) 114*

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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 132 is used this includes all visitors who stayed in the Lothians during their trip. Where the base size is 114 this shows results for the visitors who were allocated the Lothians 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: Lothians (e.g. North Berwick, Gullane, Linlithgow)
- 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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