Local Area Factsheet: Moray Speyside

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, 74 overnight visitors to Moray Speyside completed the online survey. The results shown below are based on these visitors to Moray Speyside.

Profile of overnight visitors to Moray Speyside

84% Domestic visitors
35% Scotland (residents)
49% Rest of UK

16% International visitors
8% Europe
7% Long haul including:
3% North America
5% Australasia
1% Rest of World

Average number in travel party: 2.3
Children (under 16) in party: 10%

Life Stage
Pre-nesters 4%
Families 9%
Older Independents 54%
Retirement Age 33%

Profile of trip

Moray visitors stayed on average
10.7 nights in total in Scotland including
4.7 nights in Moray

14% of visitors to Moray Speyside stayed in one coastal location

First time visitor: 9%
Repeat visitor: 91%

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

Examples of Type of Trip

A trip of a lifetime: 3%
A special holiday/short break: 16%
## Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Moray Speyside sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>77%</td>
</tr>
<tr>
<td>2</td>
<td>Outdoor activities available</td>
<td>44%</td>
</tr>
<tr>
<td>3</td>
<td>The history and culture</td>
<td>41%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>38%</td>
</tr>
<tr>
<td>5</td>
<td>It's easy to get to or close to home</td>
<td>23%</td>
</tr>
<tr>
<td>6</td>
<td>Scotland's food and drink</td>
<td>20%</td>
</tr>
<tr>
<td>7</td>
<td>A Scottish attraction</td>
<td>19%</td>
</tr>
<tr>
<td>8</td>
<td>An event or festival</td>
<td>18%</td>
</tr>
<tr>
<td>9</td>
<td>Scotland's people</td>
<td>16%</td>
</tr>
<tr>
<td>10</td>
<td>A particular experience found in Scotland</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Base: All visitors to Moray Speyside (stage 2)*

<table>
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<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>70%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>48%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>27%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
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</tr>
<tr>
<td>6</td>
<td>A Scottish attraction</td>
<td>19%</td>
</tr>
<tr>
<td>7</td>
<td>My or my family's Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<td>Scotland's food and drink</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<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)*

## Type of accommodation used in Moray Speyside

- **16%** stayed in serviced accommodation
  - 11% Hotel, motel, inn
  - 6% Guest house, B&B

- **82%** stayed in non-serviced accommodation
  - 36% Camping, caravan, motorhome
  - 27% Self-catering/commercial non-serviced rentals
  - 17% Friend's or relative's home

*Base: Stage 2 online survey Moray Speyside visitors (priority region) 71*

## Satisfaction with accommodation in Moray Speyside

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

- **Overall welcome provided to you**
  - **Average 8.79**
  - **69% 9 or 10 out of 10**

- **The knowledge of staff/host (at accommodation) about things to do in the area**
  - **Average 8.65**
  - **57% 9 or 10 out of 10**

- **The value for money of accommodation**
  - **Average 7.92**
  - **34% 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 Moray Speyside visitors in paid for accommodation excl. n/a 53-67*
Local Area Factsheet: Moray Speyside

Attractions and activities undertaken in Moray Speyside

Top 5 attractions or activities undertaken/visited in Moray Speyside

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Moray Speyside</th>
<th>Moray Speyside sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Watching wildlife, bird watching – guided or self-guided</td>
<td>38%</td>
</tr>
<tr>
<td>2</td>
<td>Hill walk, mountaineering, hike or ramble – guided or self-guided</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>A castle or fort</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>Shopping</td>
<td>33%</td>
</tr>
<tr>
<td>5</td>
<td>A nature reserve</td>
<td>32%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Moray Speyside

<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 Moray Speyside

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

- Knowledge and passion of the staff at attractions: Average 8.80 (60% 9 or 10 out of 10)
- Quality of experience at attractions: Average 8.43 (50% 9 or 10 out of 10)
- Value for money of paid for attractions: Average 8.02 (44% 9 or 10 out of 10)

Scotland-wide sample

- Knowledge and passion of the staff at attractions: 64% (9 or 10 out of 10)
- Quality of experience at attractions: 57% (9 or 10 out of 10)
- Value for money of paid for attractions: 47% (9 or 10 out of 10)

Base: Stage 2 Took part in activities/attractions in Moray Speyside excluding n/a60-63

Food and drink experiences in Moray Speyside

27% took part in food and/or drink experiences in Moray Speyside

Key food and drink experiences included:

- 13% visited a farm shop/farmers market
- 7% undertook a food or drink activity e.g. cookery class
- 6% visited a fine dining restaurant

Base: Stage 2 Took part in activities/attractions in Moray Speyside 68
Satisfaction with food and drink experiences in Moray Speyside

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

- **The service provided by staff**
  - Average 8.41
  - 46% 9 or 10 out of 10
  - Scotland-wide sample 55%

- **The quality of food and drink available**
  - Average 8.05
  - 41% 9 or 10 out of 10
  - Scotland-wide sample 48%

- **The availability of local produce when eating out**
  - Average 7.95
  - 33% 9 or 10 out of 10
  - Scotland-wide sample 37%

- **The value for money of eating out**
  - Average 7.09
  - 20% 9 or 10 out of 10
  - Scotland-wide sample 32%

Base: Stage 2 Moray Speyside visitors excl. n/a 65-72

**Overall experience and likelihood to recommend Moray Speyside**

- **Positive rating of holiday/short break experience**
  - 9 or 10 out of 10
  - 69% Moray Speyside
  - 71% for Scotland overall
    - (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - 9 or 10 out of 10
  - 73% Moray Speyside
  - 82% for Scotland overall
    - (Scotland-wide sample)

Base: Stage 2 Moray Speyside visitors (priority region) 71
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 74 is used this includes all visitors who stayed in Moray Speyside during their trip. Where the base size is 71 this shows results for the visitors who were allocated Moray Speyside 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.
- 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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