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

Profile of overnight visitors to Perthshire

68% Domestic visitors

17% Scotland (residents)
50% Rest of UK

32% International visitors

13% Europe
19% Long haul including:
13% North America
5% Australasia

Average number in travel party: 2.7

Children (under 16) in party: 15%

Life Stage

Pre-nesters 9%
Families 13%
Older independents 45%
Retirement age 34%

Profile of trip

Perthshire visitors stayed on average 9.4 nights in total in Scotland including 3.6 nights in Perthshire

31% of visitors to Perthshire stayed only in one countryside or rural location in the area

First time visitor: 23%
Repeat visitor: 77%

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

Examples of Type of Trip

A trip of a lifetime: 10%
A special holiday/short break: 21%
**Reasons for choosing Scotland**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Perthshire sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>79%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>51%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>38%</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>22%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>20%</td>
</tr>
<tr>
<td>7</td>
<td>It’s easy to get to or close to home</td>
<td>20%</td>
</tr>
<tr>
<td>8</td>
<td>Visiting friends or family</td>
<td>19%</td>
</tr>
<tr>
<td>9</td>
<td>Scotland’s food and drink</td>
<td>17%</td>
</tr>
<tr>
<td>10</td>
<td>A particular experience found in Scotland</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: All visitors to Perthshire (stage 2) 265

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<th>Rank</th>
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<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>
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</tr>
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<td>Scotland’s food and drink</td>
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</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) 3,011

**Type of accommodation used in Perthshire**

- **47% stayed in serviced accommodation**
  - 35% Hotel, motel, inn
  - 10% Guest house, B&B
  - 1% Serviced apartment

Base: Stage 2 Perthshire visitors (priority region) 165

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

- **55% stayed in non-serviced accommodation**
  - 32% Self-catering/commercial non-serviced rentals
  - 16% Camping, caravan, motorhome
  - 4% Friend’s or relative’s home

**Satisfaction with accommodation in Perthshire**

- **Average 9.05**
  - Overall welcome provided to you
  - Scotland-wide sample 62% (9 or 10 out of 10)

- **Average 8.53**
  - The knowledge of staff/host (at accommodation) about things to do in the area
  - Scotland-wide sample 53% (9 or 10 out of 10)

- **Average 8.32**
  - The value for money of accommodation
  - Scotland-wide sample 42% (9 or 10 out of 10)

*Base: Stage 2 Perthshire visitors in paid for accommodation excl. n/a 207 - 244*
Local Area Factsheet: Perthshire

Attractions and activities undertaken in Perthshire

Top 5 attractions or activities undertaken/visited in Perthshire

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Perthshire</th>
<th>Perthshire sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Shopping</td>
<td>43%</td>
</tr>
<tr>
<td>2</td>
<td>A castle or fort</td>
<td>35%</td>
</tr>
<tr>
<td>3</td>
<td>A historic house, palace, stately home</td>
<td>34%</td>
</tr>
<tr>
<td>4</td>
<td>Viewed architecture and buildings</td>
<td>32%</td>
</tr>
<tr>
<td>5</td>
<td>Hill walk, mountaineering, hike or ramble-guided or self-guided</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Perthshire

<table>
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<th>Rank</th>
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<th>Scotland-wide sample</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>59%</td>
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<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 Perthshire

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions

Average 9.00

73% 9 or 10 out of 10

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

Quality of experience at attractions

Average 8.79

58% 9 or 10 out of 10

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

Value for money of paid for attractions

Average 8.30

44% 9 or 10 out of 10

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

Base: Stage 2 Took part in activities/attractions in Perthshire excl. n/a 145 - 152
Food and drink experiences in Perthshire

29% took part in food and/or drink experiences in Perthshire

Key food and drink experiences included:

- 11% visited a farm shop/farmers market
- 9% visited a fine dining restaurant
- 3% took part in a food or drink activity, e.g., cookery classes

Base: Stage 2 Took part in activities/attractions in Perthshire 159

Satisfaction with food and drink experiences in Perthshire

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

- The service provided by staff
  - Average 8.66
  - Scotland-wide sample 55%
  - 59% 9 or 10 out of 10

- The quality of food and drink available
  - Average 8.37
  - Scotland-wide sample 48%
  - 49% 9 or 10 out of 10

- The availability of local produce when eating out
  - Average 8.13
  - Scotland-wide sample 37%
  - 42% 9 or 10 out of 10

- The value for money
  - Average 7.72
  - Scotland-wide sample 32%
  - 29% 9 or 10 out of 10

Base: Stage 2 Perthshire visitors excl. n/a 252-262

Overall experience and likelihood to recommend Perthshire

- Positive rating of holiday/short break experience
  - 67% Perthshire
  - 71% for Scotland overall
    - (Scotland-wide sample)

- Likelihood to recommend as a holiday/short break destination
  - 81% Perthshire
  - 82% for Scotland overall
    - (Scotland-wide sample)

Base: Stage 2 Perthshire visitors (priority region) 165
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 265 is used this includes all visitors who stayed in Perthshire during their trip. Where the base size is 165 this shows results for the visitors who were allocated Perthshire 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: Perthshire (e.g. Pitlochry, Aberfeldy, Blair Atholl, Crieff)
- 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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