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

Profile of overnight visitors to Stirling

47% Domestic visitors

- 5% Scotland (residents)
- 42% Rest of UK

53% International visitors

- 24% Europe
- 28% Long haul including:
  - 21% 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: 8%
- Families: 12%
- Older Independents: 53%
- Retirement Age: 27%

Profile of trip

- Stirling visitors stayed on average 10.6 nights in total in Scotland including 2.4 nights in Stirling

14% of visitors to Stirling stayed only in Stirling (i.e. did not stay elsewhere)

First time visitor: 34%
Repeat visitor: 66%

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

Examples of Type of Trip

- A trip of a lifetime: 11%
- A special holiday/short break: 30%
Local Area Factsheet: Stirling

Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Stirling sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>76%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>72%</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>30%</td>
</tr>
<tr>
<td>5</td>
<td>A Scottish attraction</td>
<td>25%</td>
</tr>
<tr>
<td>6</td>
<td>Visiting friends or family</td>
<td>19%</td>
</tr>
<tr>
<td>7</td>
<td>Scotland’s food and drink</td>
<td>19%</td>
</tr>
<tr>
<td>8</td>
<td>My or my family's Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>9</td>
<td>An event or festival</td>
<td>15%</td>
</tr>
<tr>
<td>10</td>
<td>A story or legend about Scotland</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: All visitors to Stirling (stage 2) 212

Type of accommodation used in Stirling

- **62% stayed in serviced accommodation**
  - 50% Hotel, motel, inn
  - 11% Guest house, B&B
  - 3% Serviced apartment

- **37% stayed in non-serviced accommodation**
  - 18% Self-catering/commercial non-serviced rentals
  - 14% Camping, caravan, motorhome
  - 5% Friend’s or relative’s home

Note: Accommodation types add to more than net figure due to some people staying in more than one type of accommodation.

Satisfaction with accommodation in Stirling

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

- **Overall welcome provided to you**
  - Average 8.48
  - Scotland-wide sample 62% (9 or 10 out of 10)
  - 58% 9 or 10 out of 10

- **The knowledge of staff/host (at accommodation) about things to do in the area**
  - Average 8.55
  - Scotland-wide sample 53% (9 or 10 out of 10)
  - 58% 9 or 10 out of 10

- **The value for money of accommodation**
  - Average 7.63
  - Scotland-wide sample 42% (9 or 10 out of 10)
  - 33% 9 or 10 out of 10

Base: Stage 2 Stirling visitors in paid for accommodation excl. n/a 174 - 203
Local Area Factsheet: Stirling

Attractions and activities undertaken in Stirling

Top 5 attractions or activities undertaken/visited in Stirling

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Stirling</th>
<th>Stirling sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>63%</td>
</tr>
<tr>
<td>2</td>
<td>Viewed architecture and buildings</td>
<td>33%</td>
</tr>
<tr>
<td>3</td>
<td>A cathedral, church, abbey or other place of worship</td>
<td>28%</td>
</tr>
<tr>
<td>4</td>
<td>Shopping</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
<td>A historic house, palace, stately home</td>
<td>19%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Stirling 140

<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 3,011

Satisfaction with attractions in Stirling

Satisfaction with... (Scored out of 10)

- Knowledge and passion of the staff at attractions: Average 8.94
  - 70% (9 or 10 out of 10)
  - Scotland-wide sample 64% (9 or 10 out of 10)

- Quality of experience at attractions: Average 8.83
  - 66% (9 or 10 out of 10)
  - Scotland-wide sample 57% (9 or 10 out of 10)

- Value for money of paid for attractions: Average 8.41
  - 54% (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 Stirling excl. n/a 131-137
Food and drink experiences in Stirling

19% took part in food and/or drink experiences in Stirling

Key food and drink experiences included:
- 9% visited a fine dining restaurant
- 8% visited a farm shop/farmers market
- 2% undertook a food or drink tour, e.g., food walking tour

Satisfaction with food and drink experiences in Stirling

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

- The service provided by staff: Average 8.50
  - Scotland-wide sample: 55%
  - 51% 9 or 10 out of 10

- The quality of food and drink available: Average 8.25
  - Scotland-wide sample: 48%
  - 47% 9 or 10 out of 10

- The availability of local produce when eating out: Average 7.88
  - Scotland-wide sample: 37%
  - 32% 9 or 10 out of 10

- The value for money of eating out: Average 7.70
  - Scotland-wide sample: 32%
  - 32% 9 or 10 out of 10

Overall experience and likelihood to recommend Stirling

- Positive rating of holiday/short break experience (9 or 10 out of 10): 58% Stirling
  - 71% for Scotland overall (Scotland-wide sample)

- Likelihood to recommend as a holiday/short break destination (9 or 10 out of 10): 69% Stirling
  - 82% for Scotland overall (Scotland-wide sample)
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 212 is used this includes all visitors who stayed in Stirling during their trip. Where the base size is 145 this shows results for the visitors who were allocated Stirling 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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