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, 278 overnight visitors to the wider Glasgow area completed the online survey. The resultsshowed below are based on these visitors to wider Glasgow (but excludes visitors to the City of Glasgow).

Profile of overnight visitors to Wider Glasgow

**73% Domestic visitors**

- 7% Scotland (residents)
- 66% Rest of UK

**27% International visitors**

- 11% Europe
- 15% Long haul including:
  - 10% North America
  - 5% Australasia
  - 1% Rest of World

**Average number in travel party:** 2.6

**Children (under 16) in party:** 11%

Base: Stage 2 online survey Wider Glasgow visitors 278

**Life Stage**

- Pre-nesters: 10%
- Families: 9%
- Older Independents: 55%
- Retirement Age: 26%

Base: Stage 2 Wider Glasgow visitors excl. n/a 274

Profile of trip

Wider Glasgow visitors stayed on average 9.5 nights in total in Scotland including 3.9 nights in Wider Glasgow

Base: Stage 2 online survey Wider Glasgow visitors 278

62% of visitors to the Wider Glasgow area toured around Scotland, staying in two or more places

**First time visitor:** 30%

**Repeat visitor:** 70%

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

Base: Stage 2 online survey Wider Glasgow visitors 278

**Examples of Type of Trip**

- A trip of a lifetime: 8%
- A special holiday/short break: 23%

Base: Stage 2 Wider Glasgow visitors excl. Scotland residents 268
Local Area Factsheet: Wider Glasgow

Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Wider Glasgow 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>49%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>32%</td>
</tr>
<tr>
<td>4</td>
<td>Scotland’s people</td>
<td>27%</td>
</tr>
<tr>
<td>5</td>
<td>Visiting friends or family</td>
<td>23%</td>
</tr>
<tr>
<td>6</td>
<td>Scotland’s food and drink</td>
<td>19%</td>
</tr>
<tr>
<td>7</td>
<td>My or my family’s Scottish ancestry</td>
<td>18%</td>
</tr>
<tr>
<td>8</td>
<td>A Scottish attraction</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<td>It’s easy to get to or close to home</td>
<td>13%</td>
</tr>
<tr>
<td>10</td>
<td>A particular experience found in Scotland</td>
<td>11%</td>
</tr>
</tbody>
</table>

Rank | Top ten reasons for choosing Scotland | Scotland-wide sample |
<table>
<thead>
<tr>
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</tr>
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<td>16%</td>
</tr>
<tr>
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<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 Wider Glasgow (stage 2) 278

Type of accommodation used in Wider Glasgow

40% stayed in serviced accommodation

- 35% Hotel, motel, inn
- 10% Guest house, B&B
- 1% Hostel

63% stayed in non-serviced accommodation

- 27% Self-catering/commercial non-serviced rentals
- 18% Camping, caravan, motorhome
- 16% Friend’s or relative’s home

Base: Stage 2 Wider Glasgow visitors (priority region) 175

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 Wider Glasgow

Satisfaction with... (Scored out of 10)

- Overall welcome provided to you: Average 8.68, 63% 9 or 10 out of 10
- The knowledge of staff/host (at accommodation) about things to do in the area: Average 8.59, 53% 9 or 10 out of 10
- The value for money of accommodation: Average 8.04, 42% 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 Wider Glasgow visitors in paid for accommodation excl. n/a 208-242
Attractions and activities undertaken in Wider Glasgow

Top 5 attractions or activities undertaken/visited in Wider Glasgow

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Wider Glasgow</th>
<th>Wider Glasgow sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Shopping</td>
<td>38%</td>
</tr>
<tr>
<td>2</td>
<td>Hill walk, mountaineering, hike or ramble</td>
<td>35%</td>
</tr>
<tr>
<td>3</td>
<td>A castle or fort</td>
<td>34%</td>
</tr>
<tr>
<td>4</td>
<td>A country park or garden</td>
<td>29%</td>
</tr>
<tr>
<td>5</td>
<td>A visitor or heritage centre</td>
<td>27%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Wider Glasgow 173

<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 Wider Glasgow

Satisfaction with… (Scored out of 10)

Knowledge and passion of the staff at attractions
Average 8.86
61% 9 or 10 out of 10
Scotland-wide sample 64% (9 or 10 out of 10)

Quality of experience at attractions
Average 8.85
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 8.48
48% 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 Wider Glasgow excl. n/a 152-162

Food and drink experiences in Wider Glasgow

33% took part in food and/or drink experiences in Wider Glasgow

Key food and drink experiences included:
- 17% visited a farm shop/farmers market
- 6% visited a fine dining restaurant
- 6% undertook a food or drink activity e.g. cookery class

Base: Stage 2 Took part in activities/attractions in Wider Glasgow 173
Satisfaction with food and drink experiences in Wider Glasgow

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

<table>
<thead>
<tr>
<th>Service Provided by Staff</th>
<th>Quality of Food and Drink Available</th>
<th>Availability of Local Produce When Eating out</th>
<th>Value for Money of Eating out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average 8.71 58% 9 or 10 out of 10</td>
<td>Average 8.35 50% 9 or 10 out of 10</td>
<td>Average 7.95 38% 9 or 10 out of 10</td>
<td>Average 7.86 34% 9 or 10 out of 10</td>
</tr>
<tr>
<td>Scotland-wide sample 55%</td>
<td>Scotland-wide sample 48%</td>
<td>Scotland-wide sample 37%</td>
<td>Scotland-wide sample 32%</td>
</tr>
</tbody>
</table>

*Base: Stage 2 Wider Glasgow visitors excl. n/a 254-273*

Overall experience and likelihood to recommend Wider Glasgow

<table>
<thead>
<tr>
<th>Positive Rating of Holiday/Short Break Experience (9 or 10 out of 10)</th>
<th>Likelihood to Recommend as a Holiday/Short Break Destination (9 or 10 out of 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>59% Wider Glasgow 71% for Scotland overall (Scotland-wide sample)</td>
<td>72% Wider Glasgow 82% for Scotland overall (Scotland-wide sample)</td>
</tr>
</tbody>
</table>

*Base: Stage 2 Wider Glasgow visitors (priority region) 175*
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 278 is used this includes all visitors who stayed in Wider Glasgow during their trip. Where the base size is 175 this shows results for the visitors who were allocated the Wider Glasgow area as their priority region and were asked more detailed questions. The base size refers to the unweighted base.
- The following questionnaire wording was used to describe the area: The wider Glasgow area e.g. Dumbarton, Lanark, Motherwell, Paisley, Balloch, south Loch Lomond
- 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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