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

Profile of overnight visitors to Aberdeenshire

71% Domestic visitors

- 16% Scotland (residents)
- 55% Rest of UK

29% International visitors

- 11% Europe
- 17% Long haul including:
  - 13% North America
  - 4% Australasia
- 1% Rest of World

Average number in travel party: 2.4

Children (under 16) in party: 14%

Life Stage

- Pre-nesters: 8%
- Families: 14%
- Older Independents: 39%
- Retirement Age: 39%

Profile of trip

Aberdeenshire visitors stayed on average 10.8 nights in total in Scotland including 4.9 nights in Aberdeenshire

25% of visitors to Aberdeenshire stayed in one countryside or rural location

First time visitor: 20%
Repeat visitor: 80%

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

Examples of Type of Trip

A trip of a lifetime: 8%
A special holiday/short break: 24%
Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Aberdeenshire 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>53%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>36%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>28%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>22%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>7</td>
<td>A Scottish attraction</td>
<td>15%</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>11%</td>
</tr>
<tr>
<td>10</td>
<td>An event or festival</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All visitors to Aberdeenshire (stage 2) 233

Type of accommodation used in Aberdeenshire

- **30%** stayed in serviced accommodation
  - 25% Hotel, motel, inn
  - 5% Guest house, B&B

- **71%** stayed in non-serviced accommodation
  - 27% Self-catering/commercial non-serviced rentals
  - 26% Camping, caravan, motorhome
  - 16% Friend’s or relative’s home

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 Aberdeenshire

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

- **Average 8.97**
  - 67% 9 or 10 out of 10
  - Overall welcome provided to you

- **Average 8.78**
  - 59% 9 or 10 out of 10
  - The knowledge of staff/host (at accommodation) about things to do in the area

- **Average 8.39**
  - 51% 9 or 10 out of 10
  - The value for money of accommodation

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 Aberdeenshire visitors in paid for accommodation excluding n/a 169 - 201
Attractions and activities undertaken in Aberdeenshire

Top 5 attractions or activities undertaken/visited in Aberdeenshire

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Aberdeenshire</th>
<th>Aberdeenshire sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>48%</td>
</tr>
<tr>
<td>2</td>
<td>A historic house, palace, stately home</td>
<td>44%</td>
</tr>
<tr>
<td>3</td>
<td>Viewed architecture and buildings</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>Hill walk, mountaineering, hike or ramble - guided or self-guided</td>
<td>31%</td>
</tr>
<tr>
<td>5</td>
<td>A country park or garden</td>
<td>28%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in Aberdeenshire 152*

<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 Aberdeenshire

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

Knowledge and passion of the staff at attractions

- **Average 8.77**
- 61% 9 or 10 out of 10

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

Quality of experience at attractions

- **Average 8.77**
- 59% 9 or 10 out of 10

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

Value for money of paid for attractions

- **Average 8.49**
- 50% 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 Aberdeenshire excluding n/a 139 - 147*
Food and drink experiences in Aberdeenshire

31% took part in food and/or drink experiences in Aberdeenshire

Key food and drink experiences included:
- 16% visited a farm shop/farmers market
- 11% visited a fine dining restaurant
- 3% took part in food or drink event or festival

Base: Stage 2 Took part in activities/attractions in Aberdeenshire 152

Satisfaction with food and drink experiences in Aberdeenshire

Satisfaction with……. (Scored out of 10)

The service provided by staff

Average 8.60

Scotland-wide sample 55%

57%
9 or 10 out of 10

The quality of food and drink available

Average 8.21

Scotland-wide sample 48%

47%
9 or 10 out of 10

The availability of local produce when eating out

Average 8.02

Scotland-wide sample 37%

37%
9 or 10 out of 10

The value for money of eating out

Average 7.88

Scotland-wide sample 32%

34%
9 or 10 out of 10

Base: Stage 2 Aberdeenshire visitors excl. n/a 215-227

Overall experience and likelihood to recommend Aberdeenshire

Positive rating of holiday/short break experience

(9 or 10 out of 10)

74% Aberdeenshire

71% for Scotland overall (Scotland-wide sample)

Base: Stage 2 Aberdeenshire visitors (priority region) 153

Likelihood to recommend as a holiday/short break destination

(9 or 10 out of 10)

77% Aberdeenshire

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 233 is used this includes all visitors who stayed in Aberdeenshire during their trip. Where the base size is 153 this shows results for the visitors who were allocated Aberdeenshire 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: Aberdeenshire (e.g. Ballater, Braemar)
- 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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