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, 177 overnight visitors to the Outer Hebrides completed the online survey. The results shown below are based on these visitors to the Outer Hebrides.

Profile of overnight visitors to Outer Hebrides

<table>
<thead>
<tr>
<th>Domestic visitors</th>
<th>International visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>26% Scotland (residents)</td>
<td>16% Europe</td>
</tr>
<tr>
<td>40% Rest of UK</td>
<td>18% Long haul including:</td>
</tr>
<tr>
<td></td>
<td>10%: North America</td>
</tr>
<tr>
<td></td>
<td>7%: Australasia</td>
</tr>
</tbody>
</table>

Average number in travel party: 2.5
Children (under 16) in party: 11%

Life Stage

- Pre-nesters: 11%
- Families: 10%
- Older Independents: 44%
- Retirement Age: 34%

Profile of trip

Outer Hebrides visitors stayed on average: 12.6 nights in total in Scotland including 6.0 nights in the Outer Hebrides
76% of visitors to the Outer Hebrides toured around Scotland, staying in two or more places

First time visitor: 22%
Repeat visitor: 78%
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: 17%

Base: Stage 2 online survey Outer Hebrides visitors 177
Base: Stage 2 online survey Outer Hebrides visitors excl. n/a 144
Base: Stage 2 online survey Outer Hebrides visitors excl. Scotland residents 144
Local Area Factsheet: Outer Hebrides

Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Outer Hebrides sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>86%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>56%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>43%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>26%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>22%</td>
</tr>
<tr>
<td>6</td>
<td>A Scottish attraction</td>
<td>18%</td>
</tr>
<tr>
<td>7</td>
<td>Scotland’s food and drink</td>
<td>18%</td>
</tr>
<tr>
<td>8</td>
<td>My or my family’s Scottish ancestry</td>
<td>18%</td>
</tr>
<tr>
<td>9</td>
<td>It’s easy to get to or close to home</td>
<td>12%</td>
</tr>
<tr>
<td>10</td>
<td>A particular experience found in Scotland</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: All visitors to the Outer Hebrides (stage 2 online survey) 177

<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>
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</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 online survey) 3,011

Type of accommodation used in the Outer Hebrides

43% stayed in serviced accommodation

- 24% Hotel, motel, inn
- 22% Guest house, B&B
- 4% Hostel

69% stayed in non-serviced accommodation

- 34% Self-catering/commercial non-serviced rentals
- 31% Camping, caravan, motorhome
- 10% Friend or relative’s home

Base: Stage 2 online survey Outer Hebrides visitors (priority region) 164
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 the Outer Hebrides

Satisfaction with… (Scored out of 10)

Overall welcome provided to you

Average 8.97
74% 9 or 10 out of 10
Scotland-wide sample - 62% (9 or 10 out of 10)

The knowledge of staff/host (at accommodation) about things to do in the area

Average 8.74
52% 9 or 10 out of 10
Scotland-wide sample – 53% (9 or 10 out of 10)

The value for money of accommodation

Average 7.93
38% 9 or 10 out of 10
Scotland-wide sample – 42% (9 or 10 out of 10)

Base: Stage 2 Outer Hebrides visitors in paid for accommodation excl. n/a 145-168
Local Area Factsheet: Outer Hebrides

Attractions and activities undertaken in the Outer Hebrides

Top 5 attractions or activities undertaken/visited in the Outer Hebrides

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in the Outer Hebrides</th>
<th>Outer Hebrides sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>An archaeological site</td>
<td>58%</td>
</tr>
<tr>
<td>2</td>
<td>A visitor or heritage centre</td>
<td>54%</td>
</tr>
<tr>
<td>3</td>
<td>Hill walk, mountaineering, hike or ramble</td>
<td>46%</td>
</tr>
<tr>
<td>4</td>
<td>A castle or fort</td>
<td>39%</td>
</tr>
<tr>
<td>5</td>
<td>A museum or art gallery</td>
<td>36%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in the Outer Hebrides 164*

Rank | Attractions and activities undertaken in Scotland | Scotland-wide sample |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></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 the Outer Hebrides

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

Knowledge and passion of the staff at attractions | Quality of experience at attractions | Value for money of paid for attractions

Average 8.81 | Average 8.67 | Average 8.38

61% 9 or 10 out of 10 Scotland-wide sample - 64% (9 or 10 out of 10)

59% 9 or 10 out of 10 Scotland-wide sample - 57% (9 or 10 out of 10)

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 the Outer Hebrides excl. n/a153-157*

Food and drink experiences in the Outer Hebrides

28% took part in food and/or drink experiences in the Outer Hebrides

Key food and drink experiences included:
- 14% visited a farm shop/farmers market
- 11% visited a fine dining restaurant
- 2% undertook a food or drink activity e.g. cookery class

*Base: Stage 2 online survey: Took part in activities/attractions in the Outer Hebrides 164*
Satisfaction with food and drink experiences in the Outer Hebrides

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

- **The service provided by staff**
  - Average: 8.56
  - 56% 9 or 10 out of 10
  - Scotland-wide sample – 55%

- **The quality of food and drink available**
  - Average: 8.02
  - 43% 9 or 10 out of 10
  - Scotland-wide sample – 48%

- **The availability of local produce when eating out**
  - Average: 7.91
  - 40% 9 or 10 out of 10
  - Scotland-wide sample – 37%

- **The value for money of eating out**
  - Average: 7.58
  - 32% 9 or 10 out of 10
  - Scotland-wide sample – 32%

*Base: Stage 2 Outer Hebrides visitors excl. n/a 169-173*

Overall experience and likelihood to recommend the Outer Hebrides

- **Positive rating of holiday/short break experience**
  - (9 or 10 out of 10)
  - 85% Outer Hebrides
  - 71% for Scotland overall (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - (9 or 10 out of 10)
  - 90% Outer Hebrides
  - 82% for Scotland overall (Scotland-wide sample)

*Base: Stage 2 Outer Hebrides visitors (priority region) 164*

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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 177 is used this includes all visitors who stayed in the Outer Hebrides during their trip. Where the base size is 164 this shows results for the visitors who were allocated the Outer Hebrides as their priority region.
- 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.

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