

# SCOTLAND VISITOR SURVEY 2023

## VISITOR/TRIP PROFILE (82 SLIDES)

1. Where do our visitors come from?
2. What are their key demographics?
3. What type of trip are they on?
4. What's their relationship with Scotland? Are they first time or repeat visitors? How much knowledge and experience do they have about Scotland?

April 2024

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# Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023. The sample comprises leisure overnight visitors only
- The data is weighted to reflect the profile of visitors to Scotland and it's regions



# 1.0 Country of Residence

**Domestic: 73%**

**International: 27%**



Scotland: 27%



England: 41%



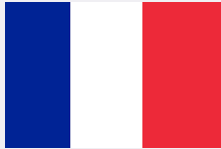
Wales: 2%



N. Ireland: 2%



Germany: 3%



France: 2%



Spain: 1%



Netherlands: 1%



Italy: 1%



Other Europe: 4%



USA: 8%



Canada: 2%



Australia: 2%



Other long haul: 4%

Interpretation Note: data weighted to reflect GBTS/IPS proportions on international vs domestic visitors

## Visitor Profile: Key Highlights

**85%**

on a purely leisure  
break

**13%**

Visiting friends and  
relatives

**5%**

were combining a business  
trip with a leisure trip or  
working remotely as part  
of their break

**25%**

were first time visitors

**10%**

were on the trip of a  
lifetime

## Key Highlights

**50%**

were aged over 55

**15%**

were pre-nesters – aged  
16-34 with no children

**7.3**

average nights in Scotland

**2.8**

average people in party

# Key Highlights

Party composition/type of traveller

- 66%** were travelling with their partner or spouse
- 16%** were travelling with children under 16 in their party
- 11%** were travelling with a pet
- 9%** were travelling on their own
- 9%** had a long term health condition, impairment or disability

Base (All – Stage 1): 11,572



## UK Visitor Profile Key Highlights

10%

were first time visitors to Scotland

37%

were regular visitors to Scotland  
(at least once per year)

25%

of repeat visitors claimed to have  
excellent knowledge about what  
to see and do in Scotland





# UK Visitor Profile Key Highlights

Party composition/type of traveller

- 52%** were over 55
- 14%** were travelling with a pet
- 11%** had a long term health condition, impairment or disability
- 10%** were travelling on their own
- 7%** of Scotland residents were on a bleisure break



## Europe Visitor Profile Key Highlights

50%

were first time visitors to Scotland

28%

were in the 16-34 age range (youngest of all markets)

7%

were students or in full time education (highest of all markets)



## Europe Key Highlights

72%

toured around Scotland staying in 2 or more places

20%

stayed only in an urban location

10.4

average number of nights



# Long Haul Visitor Profile Key Highlights

61%

were first time visitors to Scotland

29%

were on the trip of a lifetime

5%

were travelling as part of an organised group/tour



## Long Haul Key Highlights

**80%**

were touring around Scotland  
staying in one or more places

**15%**

stayed only in an urban location

**11**

nights on average in Scotland



## 2.0 ALL VISITORS: DETAILED PROFILE

## 2.1 Key Demographics

In this section we are looking at the overall demographics of Scotland's visitors in terms of their age, lifestage, working status and whether they were travelling with any long-term health condition, disability or infirmity

- Scotland's visitors are from all age groups with half of respondents aged 55+ with almost a third in the 35-54 range. 17% were in the youngest age category (16-34).
- More than two fifths of respondents (44%) were in the older independents lifestage with a further 26% being of retirement age. Families made up 14% with 15% in the pre-nester lifestage.
- More than three fifths of respondents were in full time work with a further 31% being retired.
- 4% were students/in full time education.
- 9% of respondents reported they had a long-term health condition, disability or infirmity.

## 2.2 Purpose of Trip

The Scotland Visitor Survey aimed to speak to overnight leisure visitors, but we were also interested in the trend of bleisure – those combining a business trip with leisure (business extenders) or those working remotely whilst enjoying a leisure break.

- Overall, 85% of visitors were on a leisure trip with 13% visiting friends and family. A small number (2%) mentioned other reasons (see note).
- 4% were combining a business visit with a leisure trip. The majority of these were UK visitors (73%) with some on their first trip to Scotland. This group were also more likely to be pre-nesters.
- 1% were also working remotely as part of their leisure break - mainly from the UK and were repeat visitors to Scotland with pre-nesters over indexing.

Note: Other reasons: attending specific events e.g. weddings, graduations, picking up family from airport, literary society gatherings etc.



## 2.3 Type of Trip

We also wanted to find out what type of leisure trip our visitors were taking (please note Scotland residents were excluded from this question)

- Some visitors (10%) were on ‘the trip of a lifetime’. These were much more likely to be long haul/rest of world visitors.
- Just over a fifth (21%) were on ‘a special holiday/short break’ e.g. to celebrate a birthday/anniversary etc.
- Almost half (49%) were on a regular holiday or short break in Scotland. More than two thirds of these were UK repeat visitors.
- 19% were on a one-off holiday or short break.

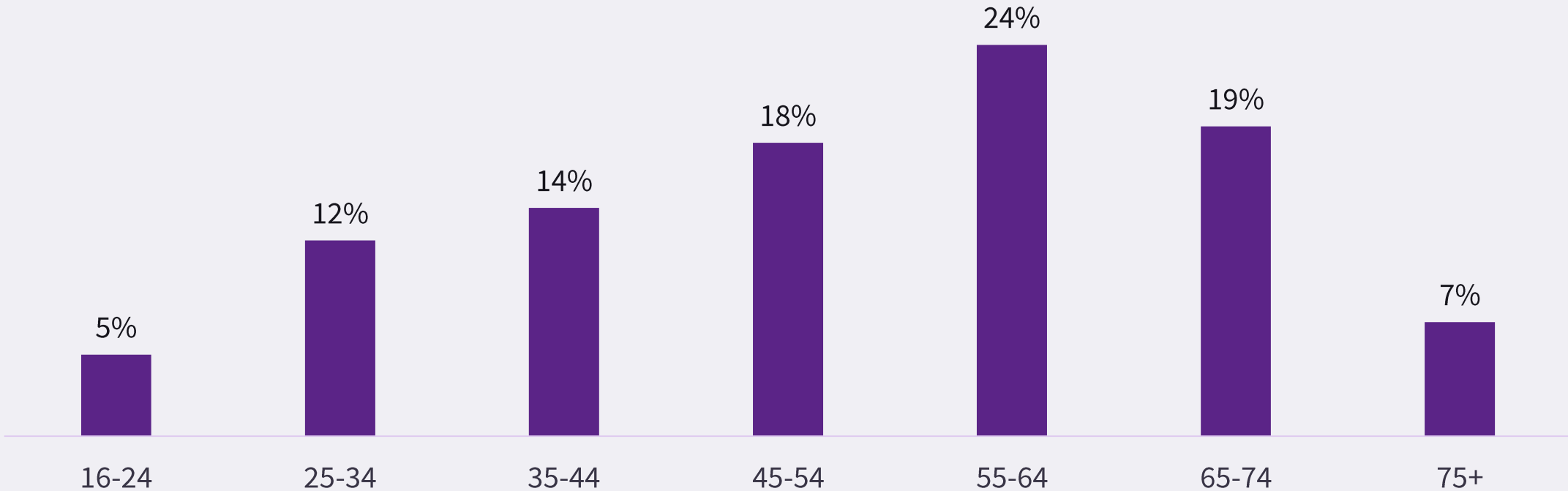
## 2.4 Party composition

With the rise in pet ownership and the trend of solo travel we were also interested to find out the composition of parties taking a holiday or short break in Scotland

- Approx two thirds (66%) were travelling with a partner or spouse
- 15% were travelling with their child/children under 16
- 5% were travelling with parents or partner's parents
- 14% were on a break with other members of their family
- 3% were on an organised tour
- 9% of visitors were solo travellers
- 11% were on their trip with their pet - 99% of these with dog(s)

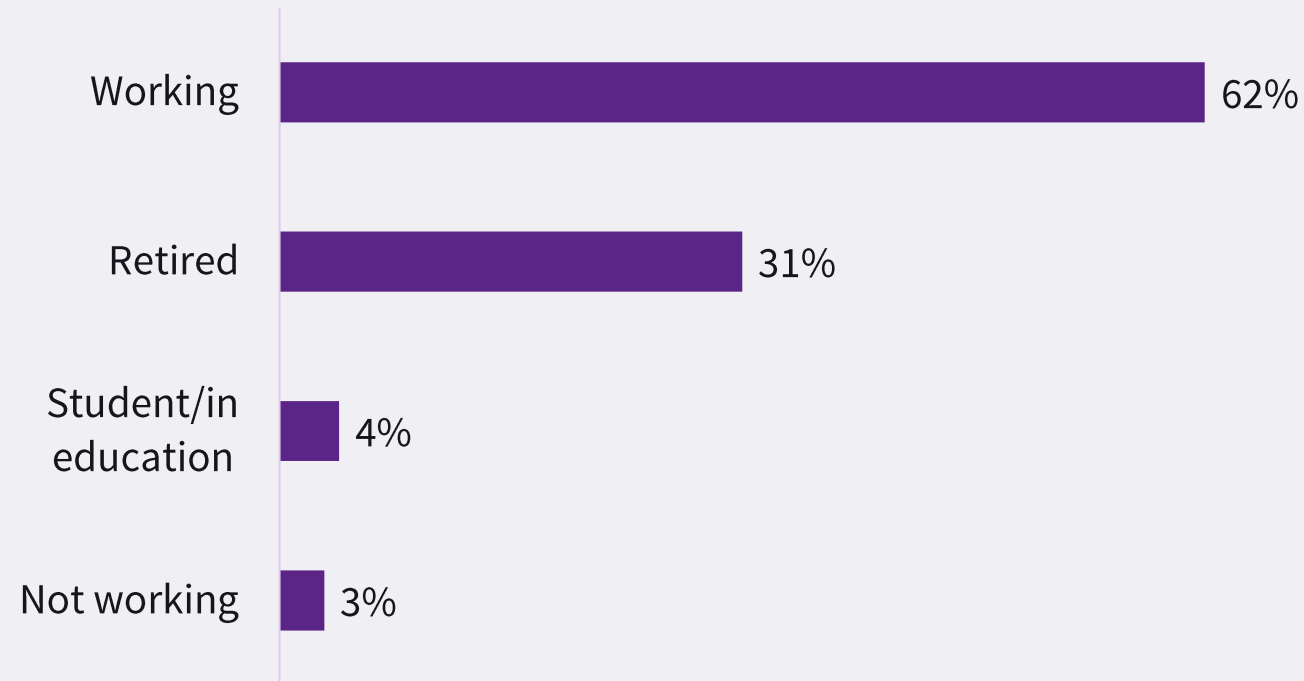
# Demographic profile

The overall sample was slightly skewed to older age groups with half aged 55+.



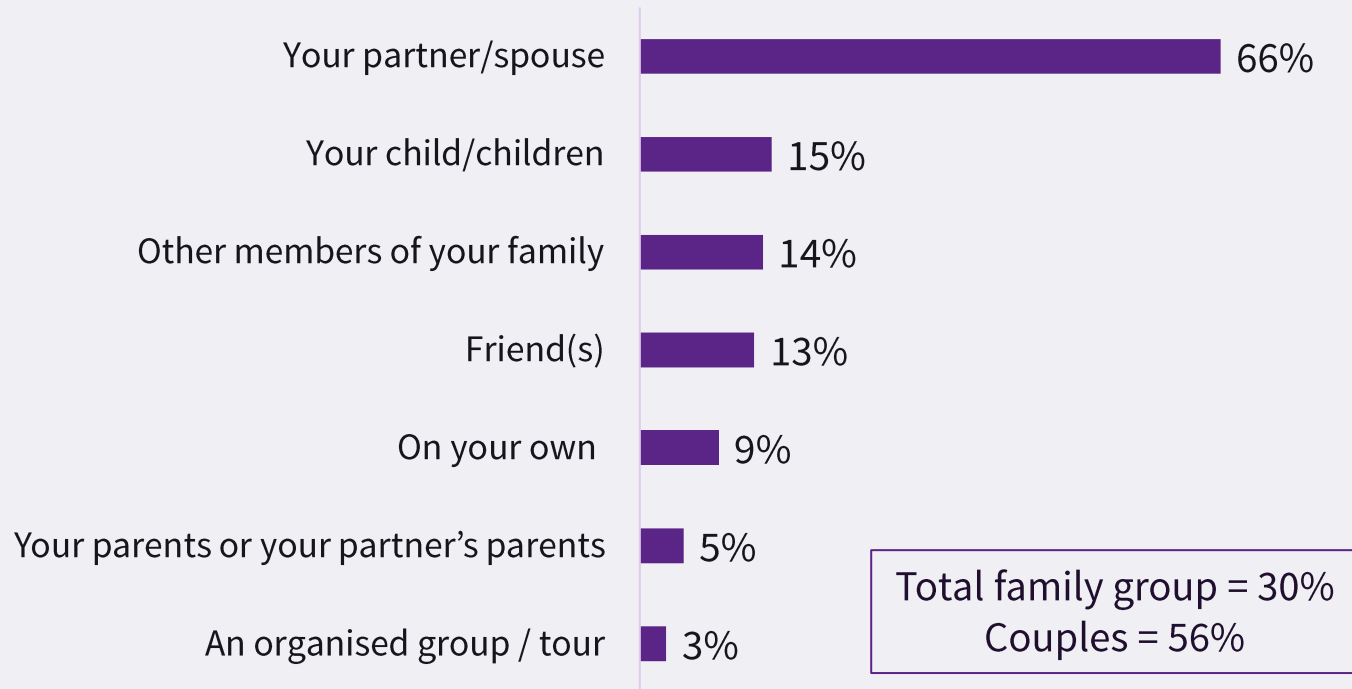
# Working status

More than three in five visitors across the total sample were in employment/work and almost a third were retired.



# Party composition

Over half of visitors were travelling as a couple, while three in ten were visiting as a family group. In total, one in six had children under 16 years old in their group.



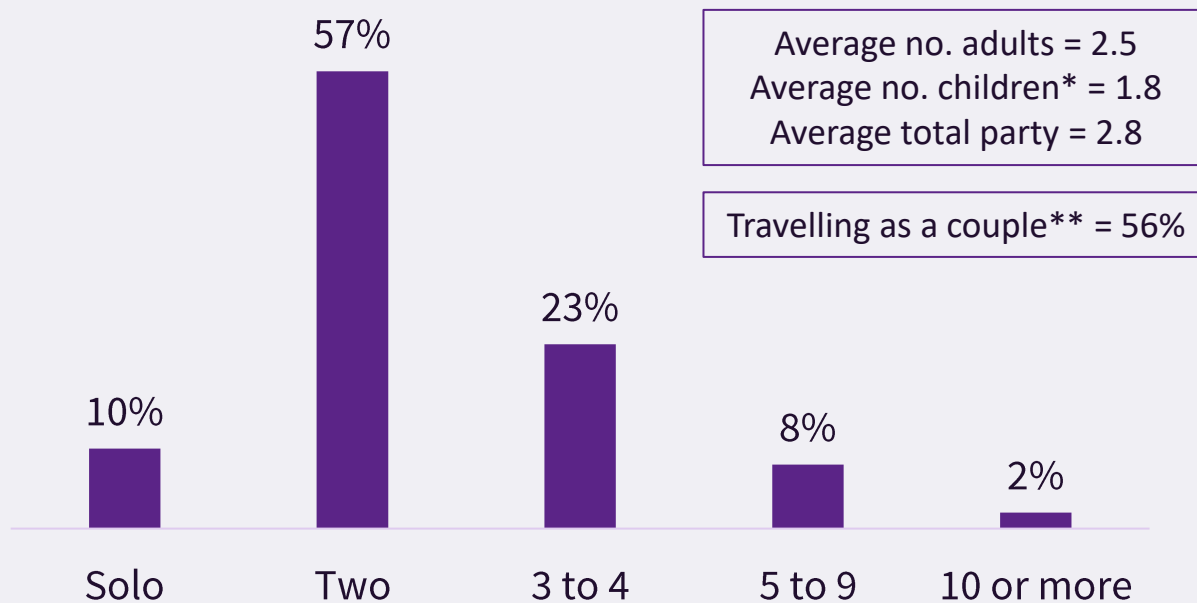
**16%**  
had children aged under 16 years old in their party



**11%**  
were travelling with pets or animals

# Overall number of people in party

Almost three fifths of visitors were on holiday with one other person, while one in ten was travelling solo. For those with children, the average number in the group was 2, while the overall average party size was 3 people.

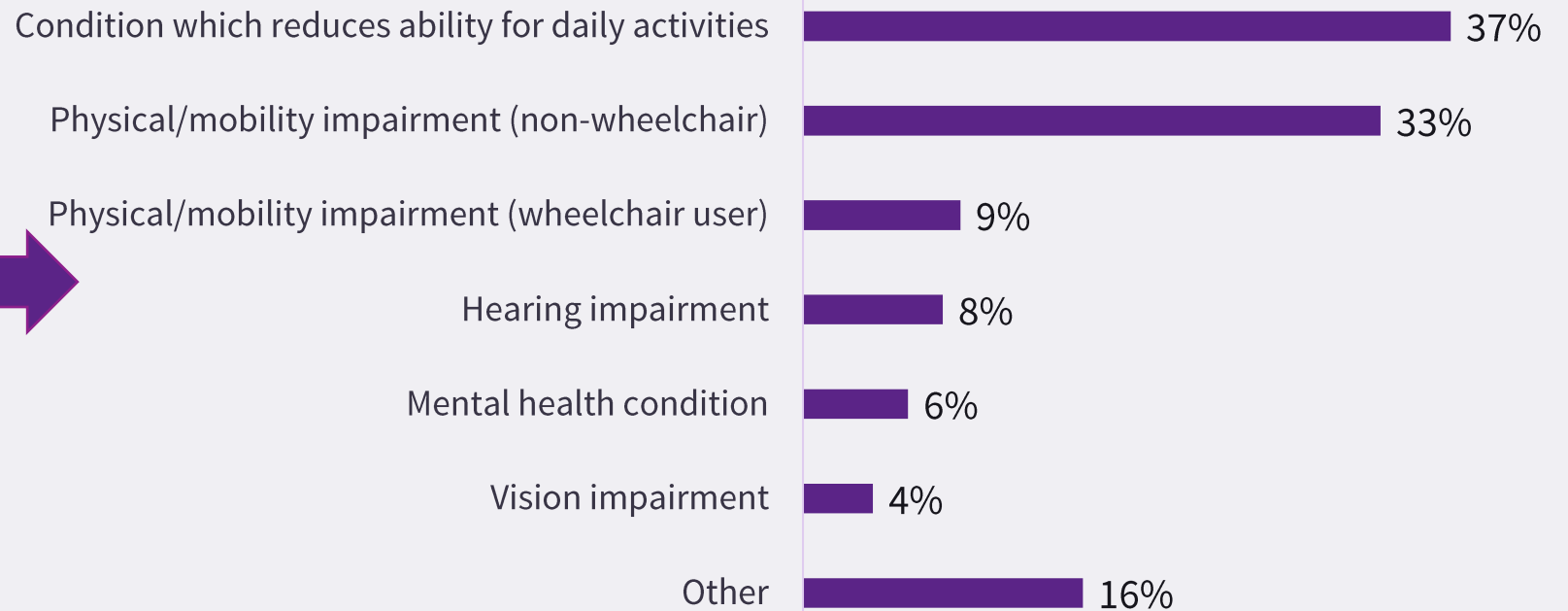


- As expected, families were more likely to be travelling in a larger party (4.4) than other life-stage groups.
- First time visitors were more likely to be travelling in a slightly larger party (3.0) than repeat visitors (2.7).

# Health conditions

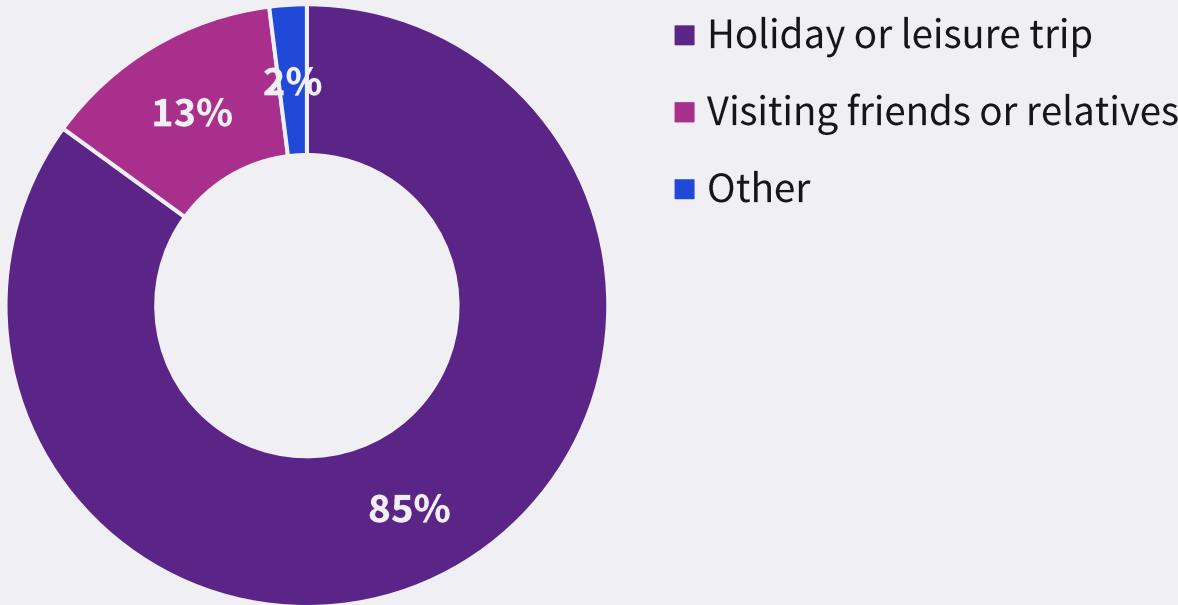
Around one in ten visitors had a long-term health condition, most commonly an illness or condition that reduces ability to carry out day-to-day activities or a mobility impairment.

**9%**  
of respondents  
reported they have  
long-term health  
condition, disability or  
infirmity



# Main purpose of holiday or short break

Whilst the main purpose of the holiday or short break was leisure for the majority of visitors, around one in eight were visiting friends or relatives.



Visitors from Europe (91%) were the most likely to be on a holiday/leisure trip (UK 84%, long haul 87%). Those from UK (14%) and long haul markets (12%) more likely to be VFR (Europe 8%).

A small minority of 4% reported that they were combining a business trip with a holiday, while 1% were going to be working remotely during their trip.



# Type of holiday or short break

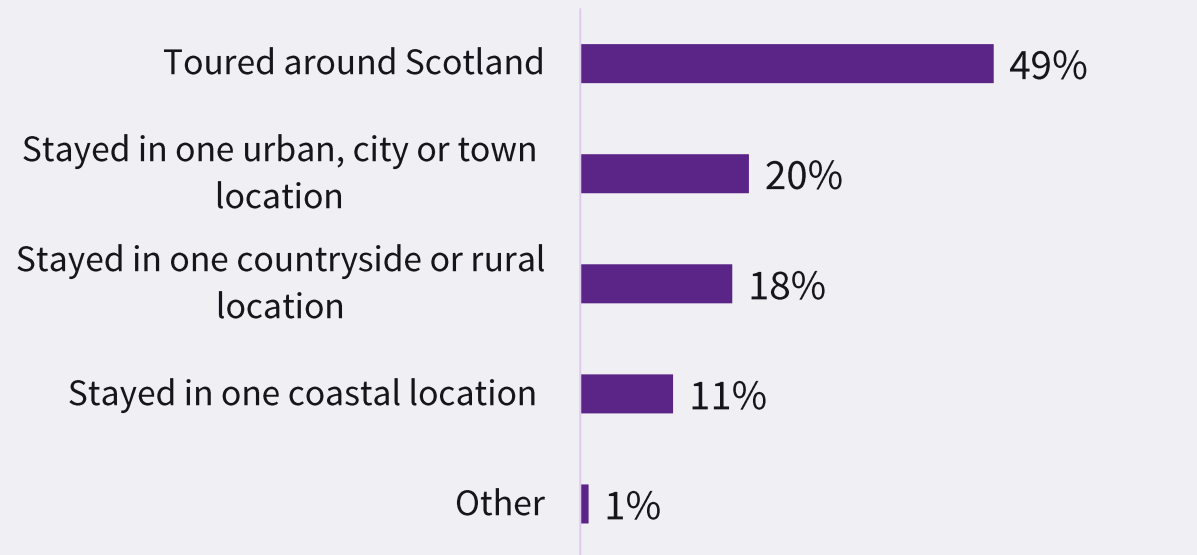
Half of visitors (who did not live in Scotland) reported that their trip was a regular holiday to Scotland, while one in five reported they were celebrating a special occasion or were on a one-off visit. One in ten visitors described their holiday as a trip of a lifetime.



- Long haul visitors were more likely to be on a trip of a lifetime (29%) or a special holiday (33%) than visitors from Europe (12% trip of a lifetime; 21% special holiday) or the Rest of UK (3% trip of a lifetime; 18% special holiday).
- Pre-nesters were more likely to be on a trip of a lifetime (13%) than other life-stage groups. They were less likely to be on a regular holiday/short break (40%).
- First time visitors were more likely to be on a trip of a lifetime (22%) or a special holiday (25%) than repeat visitors (trip of lifetime 4%; special holiday 20%).
- Repeat visitors were more likely to be on a regular holiday (55%) or a one-off holiday (20%) than first time visitors (34% regular holiday, 17% one off holiday).

# Multi or single destination trip

Half of visitors reported staying in more than one location on their trip. Those who stayed in only one place tended to choose a city or countryside location.

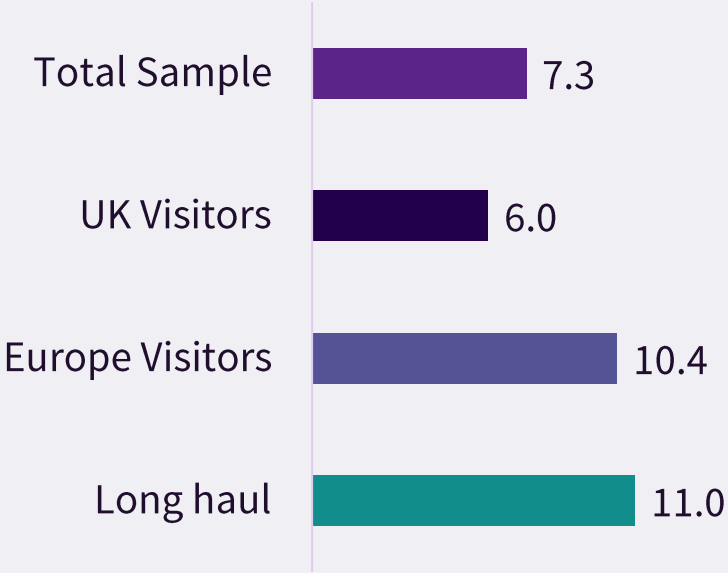


Long haul (80%) and Europe (72%) visitors were more likely to tour around Scotland than those from the UK (37%); while visitors from UK were more likely to stay in one rural (24%) or coastal (15%) location than those from Europe (4% and 3%) or long haul countries (2% and 2%).

# Number of nights spent in Scotland

The average length of time spent in Scotland was just over a week (7.3 nights). Visitors from Europe and long haul countries tended to stay longer than those from the UK.

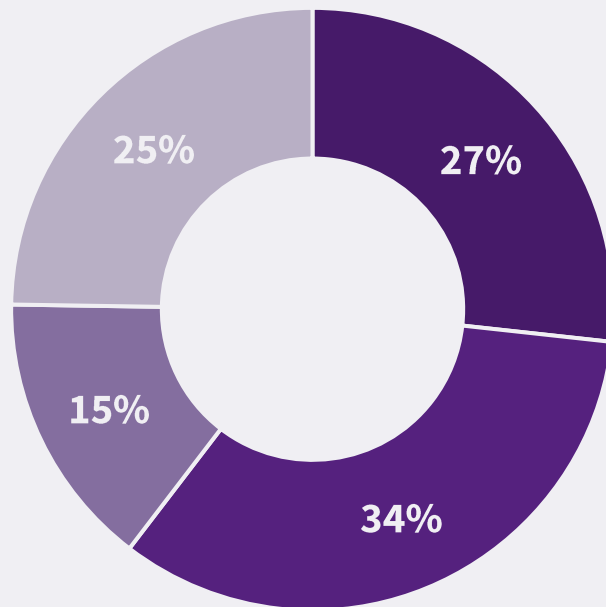
Average no. of nights spent in Scotland



- Long haul visitors tended to stay the longest in Scotland (11.0 nights).
- Those at retirement age were more likely to stay the longer (7.6 nights) than other life-stage groups.
- Pre-nesters (6.5 nights) and families (6.8 nights) spent the least number of nights in Scotland compared to the other life-stage groups.
- First time visitors tended to have a longer stay (8.9 nights) than repeat visitors (6.8 nights).
- Visitors on a trip of a lifetime on average stayed for longer (10.7 nights) than those not on a lifetime trip (8.1 nights).

# Previous visits to Scotland

One quarter of all visitors were first time visitors to Scotland, while just over a quarter were regular visitors.



- Take holidays or short breaks in Scotland regularly
- Taken a holiday/short break in Scotland several times before
- Taken a holiday or short break in Scotland once before
- This was first holiday or short break in Scotland

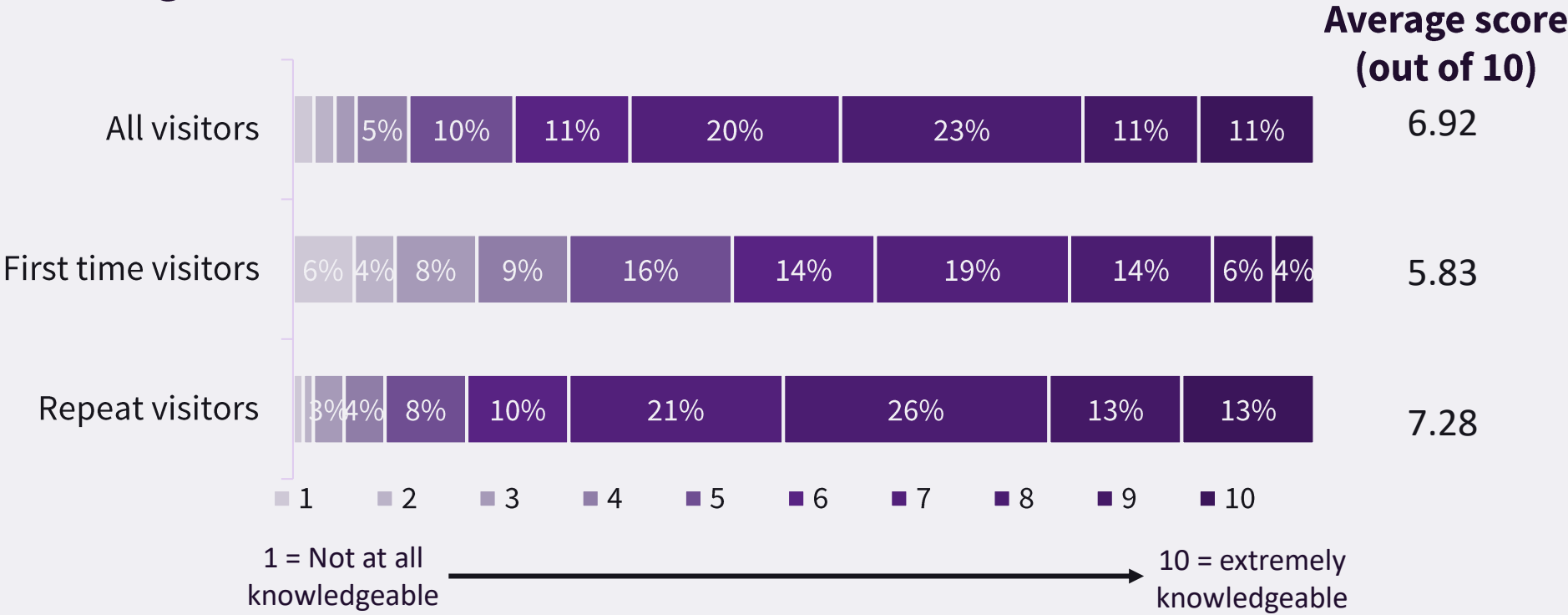
- Amongst UK visitors, 10% were first time visitors, compared to 57% from overseas.
- Almost all visitors who lived in Scotland (99%) had taken a holiday in Scotland before, with 69% reporting that they regularly have holidays or short breaks there.
- Visitors from the USA were more likely to be a first time visitor (68%), compared to those from Europe (50%).
- Visitors aged 16-34 were also more likely to be first time visitors (44%) than those from older age groups (18% of 55+).

Base (All): 3,011

Q2 (Stage 2): Was this recent trip the first time you have taken a holiday or short break in Scotland, or have you had a holiday or short break in Scotland before?

# Knowledge of Scotland

The majority of all visitors felt knowledgeable about where to go and what to do, with over one in five feeling they have excellent knowledge, scoring 9 or 10. Amongst first time visitors, over half felt they had reasonably good knowledge about Scotland before their trip, scoring 6 to 10.

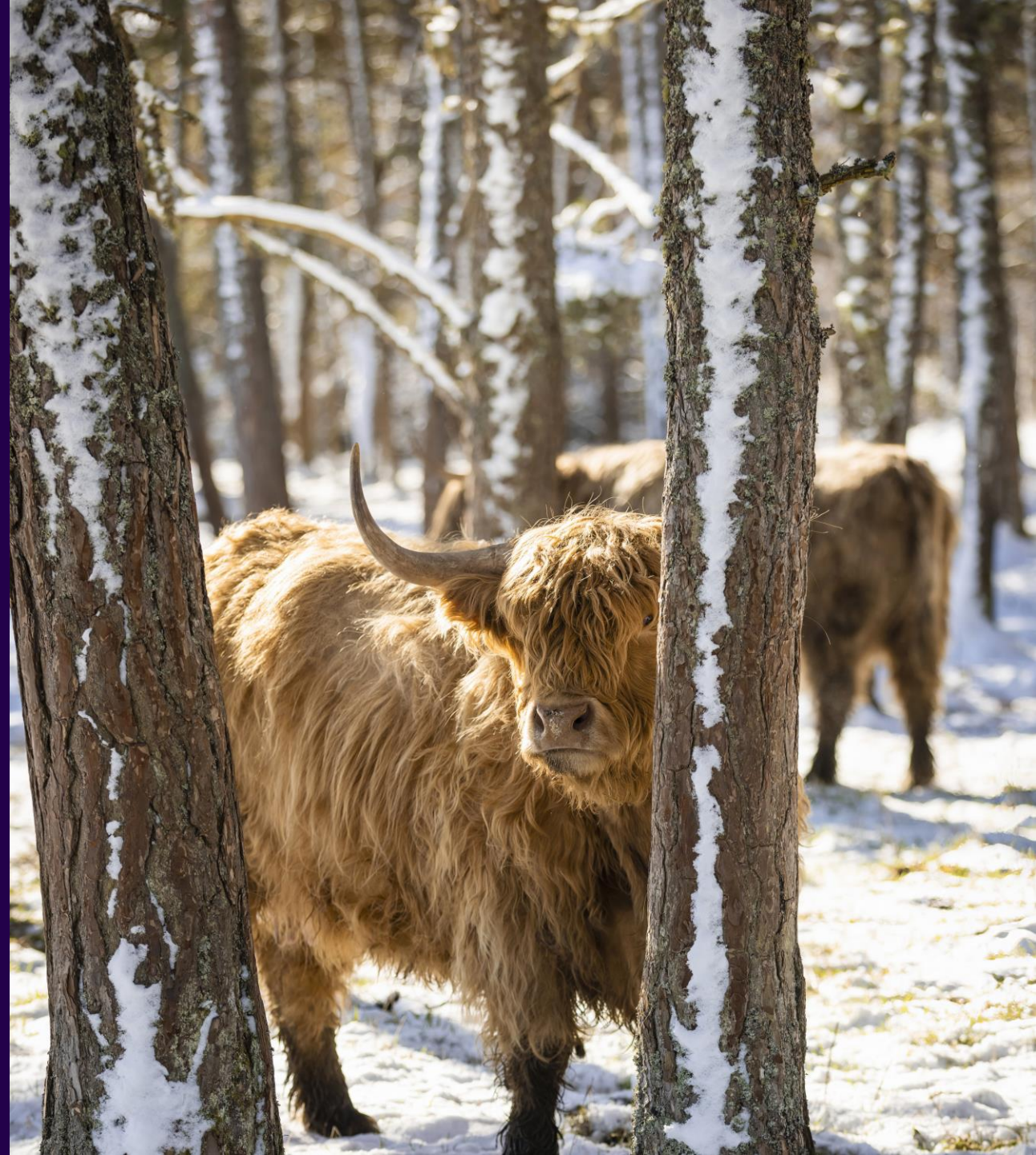


Base (All): all visitors 3,011, first time visitors 917, repeat visitors 2,094  
 Q4 (Stage 2): Before your recent holiday or short break in Scotland, how knowledgeable did you feel about where to go and what to do in Scotland when on a trip?

## 3.0 UK VISITOR PROFILE

## 3.1 UK Visitors: Key Demographics

- UK visitors are from all age groups with just over half being over 55.
- Three out of 5 UK visitors were in employment with around a third retired.
- 11% reported they had a long-term health condition, disability or infirmity.
- UK respondents were more likely to be older independents (43%) or of retirement age (25%) with 12% pre-nesters and 15% families.
- 84% of UK visitors were on a leisure trip, with 14% visiting friends and relatives.



## 3.2 UK Visitors : Type of Trip

- More than half of visitors (54%) from the rest of the UK were on a regular holiday or short break .
- Nearly a quarter were on a one-off holiday/short break.
- 18% were on a special holiday/short break to celebrate a birthday/anniversary.
- 3% were on the 'trip of a lifetime'.





## 3.3 UK Visitors: Party Composition

- The majority of UK respondents were travelling with their partner or spouse (68%)
- 16% were travelling with their child/ children (under 16).
- 17% were travelling with their parents or other members of the family.
- Those travelling with friends made up 12%.
- 10% of UK visitors were travelling on their own.
- 14% were travelling with pet(s).



## 3.4 UK Visitors: Loyalty

- 10% stated they were first time visitors to Scotland with those originating from outside Scotland more likely to be so (13%).
- 37% claimed to be regular visitors to Scotland (at least once per year) with Scotland residents much more likely to be in this top loyalty band (69%).
- Visitors with children in their group were more likely to say they take regular holidays in Scotland (45%) than those who did not have children (36%).



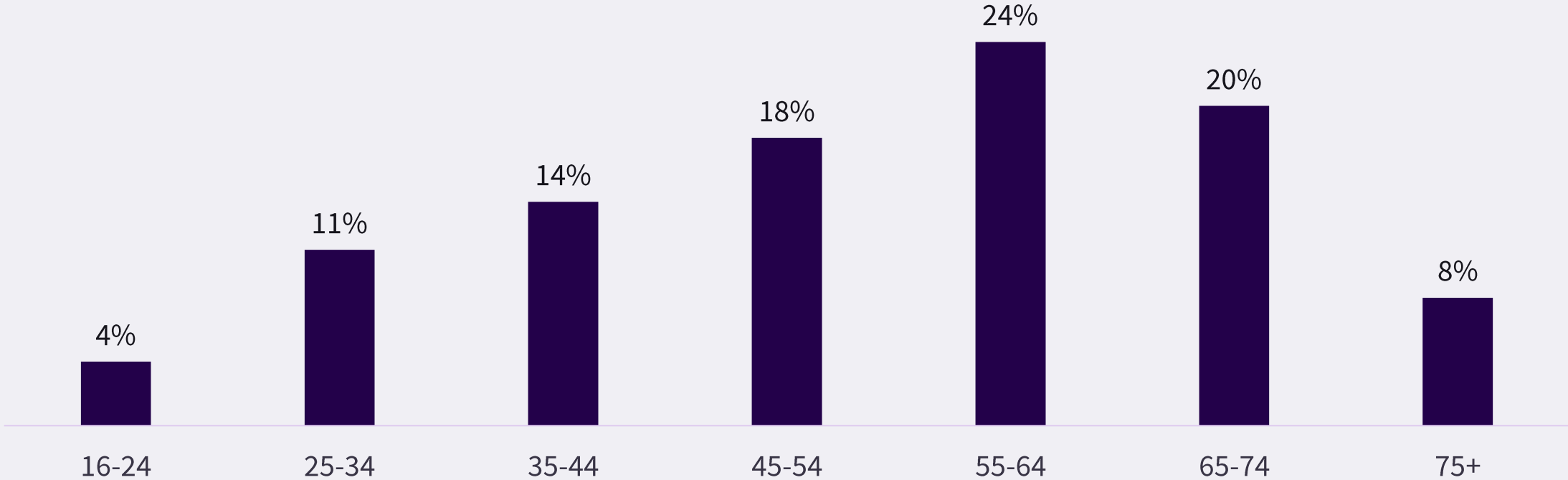
## 3.5 UK Visitors: Trip characteristics

- A quarter of UK visitors were on a short break of 1-3 nights with Scotland residents more likely to be on a shorter break (46%) than visitors from the rest of the UK (18%). A further 46% of UK visitors were on a holiday of 4-7 nights.
- More than a quarter (27%) of visitors from the rest of the UK were on a holiday of 8-14 nights (Scotland residents 10%).
- More than a third (37%) of UK visitors were touring around Scotland with a fifth staying in an urban, city or town location. 11% stayed in a coastal location. Scotland residents were the most likely to be staying in a coastal location (28%).
- Amongst repeat visitors, 55% claimed to have explored Scotland in the past with Scotland residents far more likely to be in this category (78% versus 46% rest of UK).
- A quarter of repeat visitors claimed to have excellent knowledge about what to see and do in Scotland.



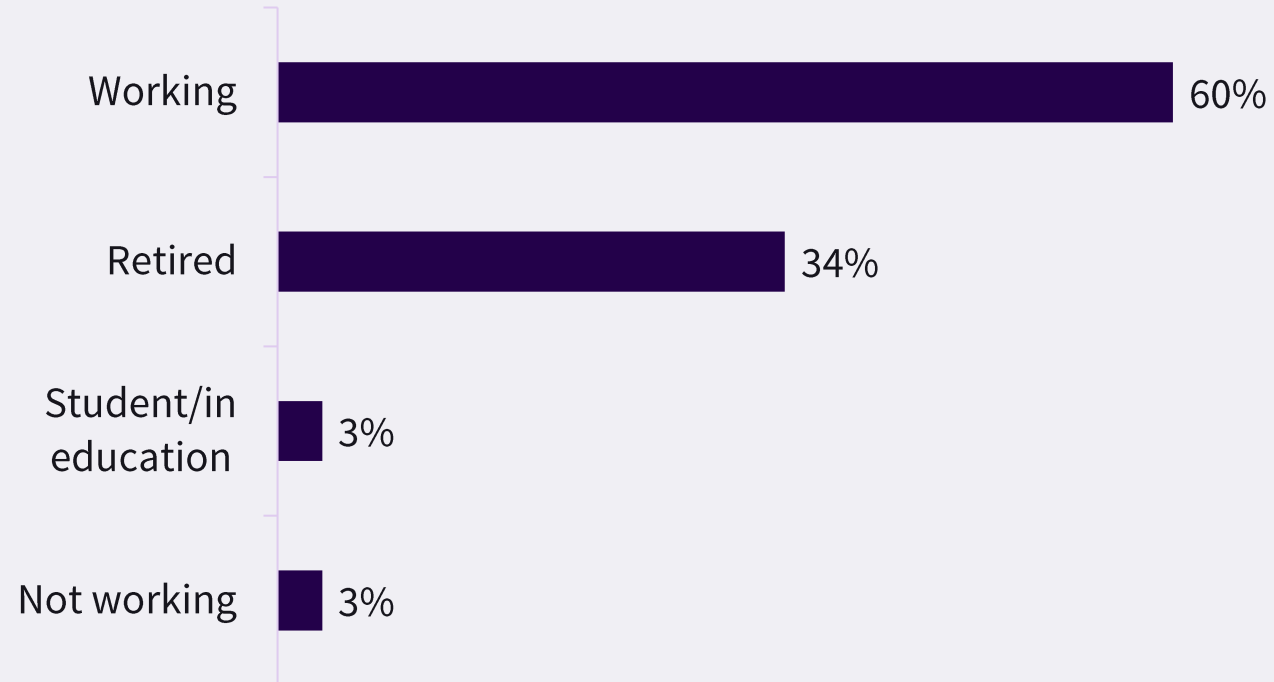
# Demographic profile: UK visitors

The profile of UK visitors was slightly skewed to older age groups with more than half aged 55+.



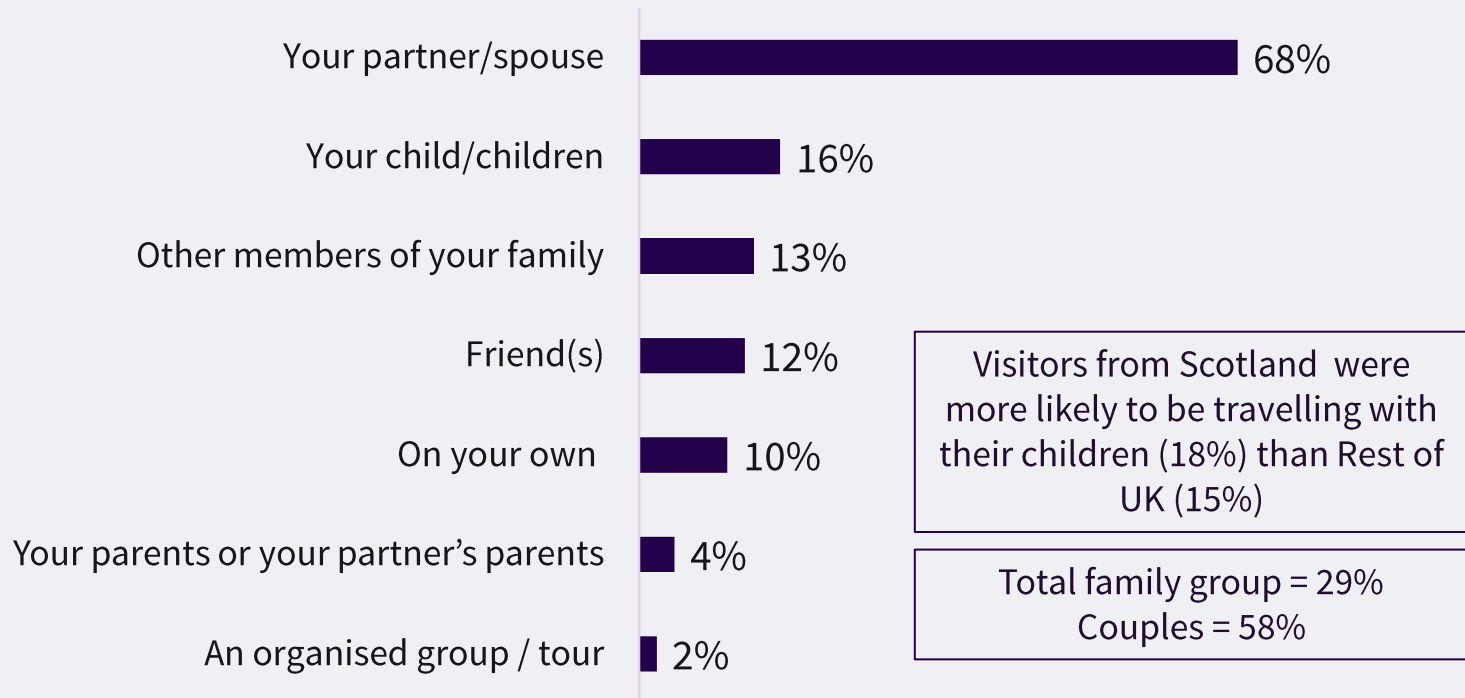
# Working status: UK visitors

Three out of five of visitors from the UK were in work with just over a third retired.



# Party composition: UK visitors

Almost six in ten of UK visitors were on holiday as a couple, while three in ten were travelling with a family group. Just less than one in five had children under 16 years old in their group.



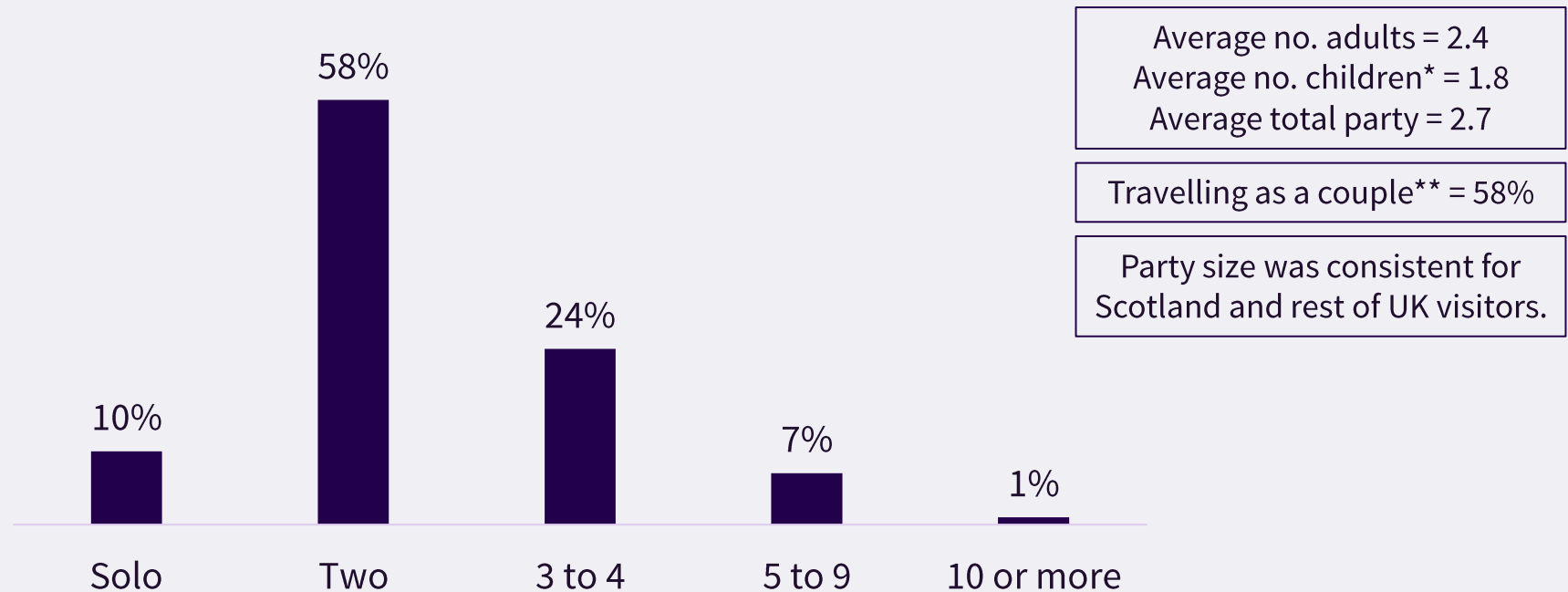
**18%**  
had children aged under 16 years old in their party



**14%**  
were travelling with pets or animals

# Overall number of people in party: UK visitors

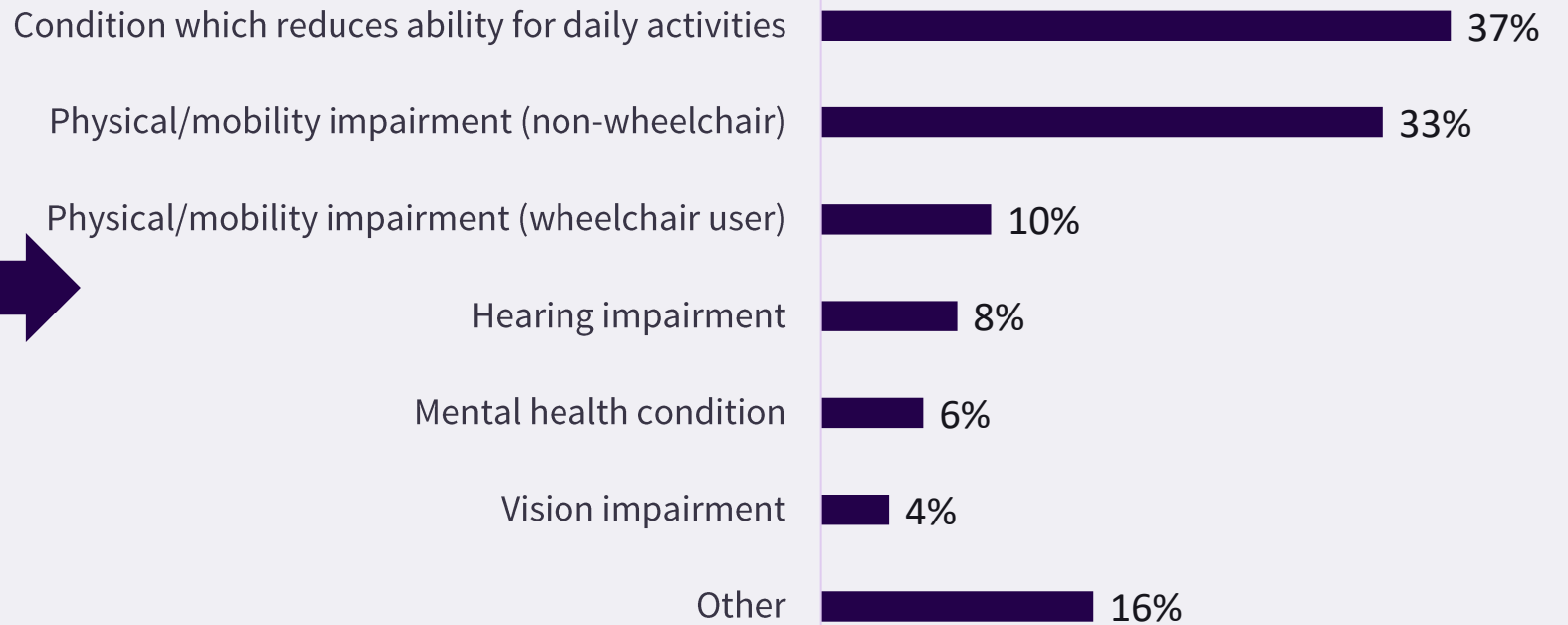
Almost three in five UK visitors were on holiday with one other person, while one in ten was travelling solo. For those with children, the average number in the group was 2, while the overall average party size was 3 people.



# Health conditions: UK visitors

Just over one in ten UK visitors had a long-term health condition, which was most likely to be an illness or condition that reduces ability to carry out day-to-day activities or a mobility impairment.

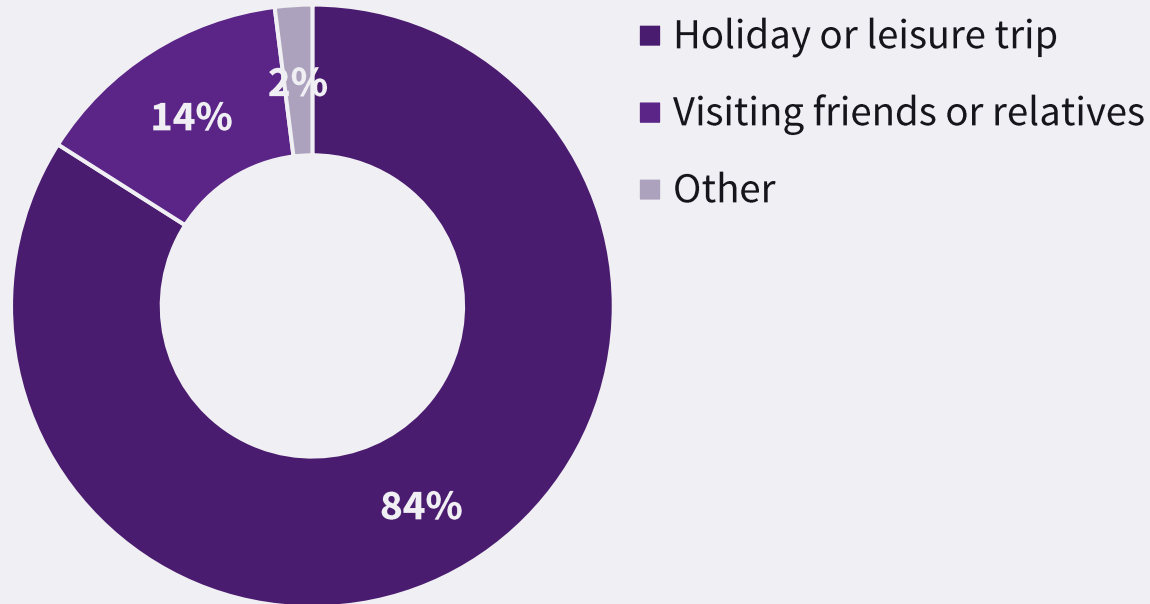
**11%**  
of respondents  
reported they have  
long-term health  
condition, disability or  
infirmity





# Main purpose of holiday or short break: UK visitors

For the majority of UK visitors the main reason of their holiday in Scotland was for leisure purposes, while around one in eight were visiting friends or relatives.

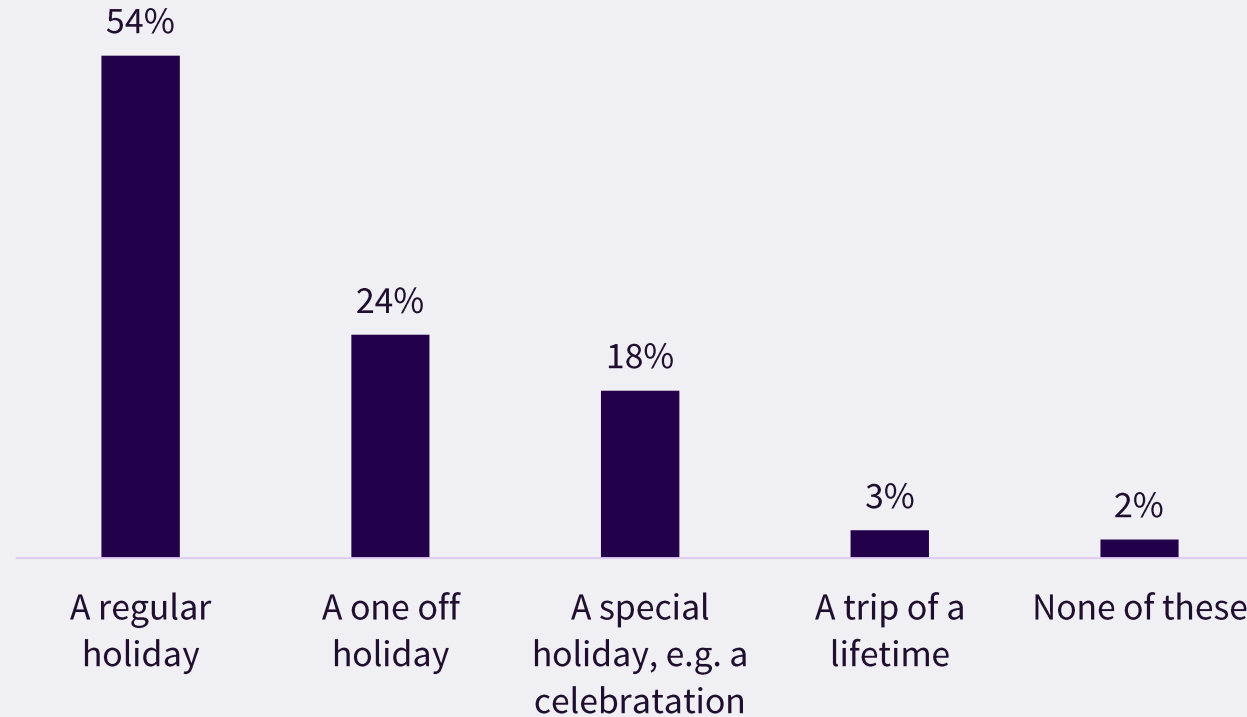


Visitors from Scotland (86%) were more likely to be on a holiday/leisure trip than those from the rest of UK (83%).

4% of UK visitors reported that they were combining a business trip with a holiday, and 1% were going to be working remotely during their trip.

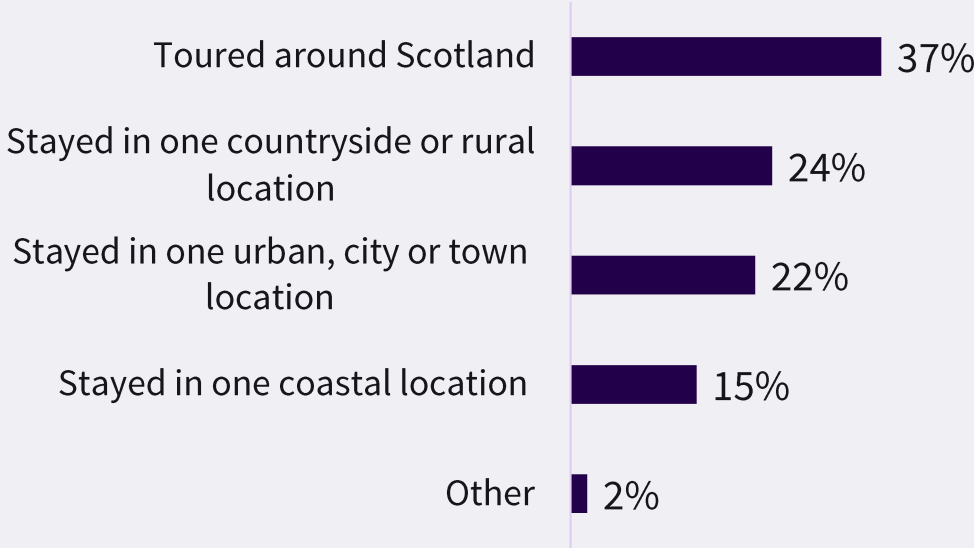
# Type of holiday or short break: Rest of UK visitors

Over half of rest of UK visitors reported that their trip was a regular holiday, while a quarter were on a one-off visit. One in five visitors reported that their holiday was to celebrate a special occasion.



# Multi or single destination trip: UK visitors

The majority of UK visitors (63%) stayed in one location for their trip, most commonly a countryside or urban location.

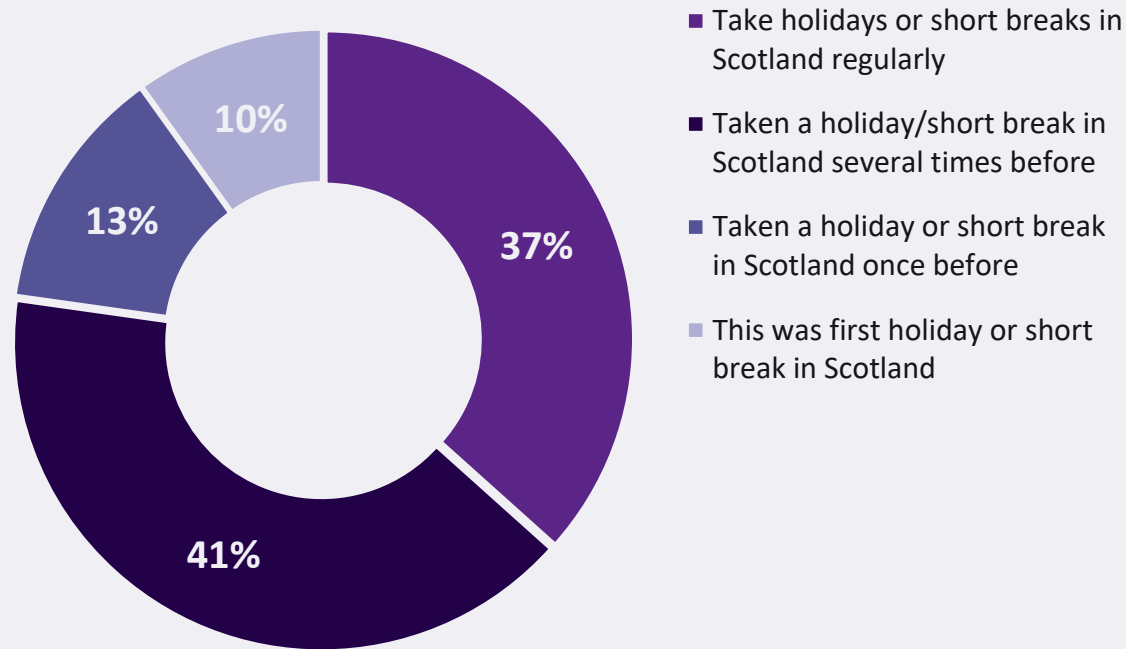


Visitors from the rest of UK were more likely to tour around Scotland (43%) than visitors from Scotland (20%). Visitors from Scotland were more likely to stay in a rural (29%) or coastal (28%) location than those from the rest of the UK (22%, 11% respectively).



# Previous visits to Scotland: UK visitors

One tenth of UK visitors were first time visitors to Scotland, while over a third were regular visitors.



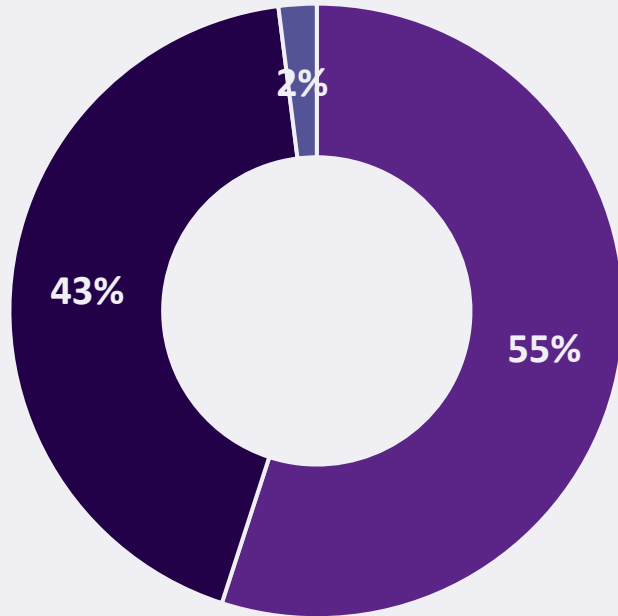
- A higher proportion of visitors who live in Scotland (69%) reported that they take regular holidays in Scotland, compared to those living in other parts of the UK (26%).
- Visitors who live in other parts of the UK were more likely to be first time visitors (13%) than visitors who live in Scotland (1%).
- Visitors with children in their group were more likely to say they take regular holidays in Scotland (45%) than those who did not have children (36%).

Base (All UK visitors): 1,531

Q2 (Stage 2): Was this recent trip the first time you have taken a holiday or short break in Scotland, or have you had a holiday or short break in Scotland before?

# Exploration of Scotland: UK visitors

Amongst repeat UK visitors, more than half had explored Scotland extensively in the past.



- I have explored a lot of Scotland in the past
- I have explored a little of Scotland in the past
- I have not explored Scotland in the past

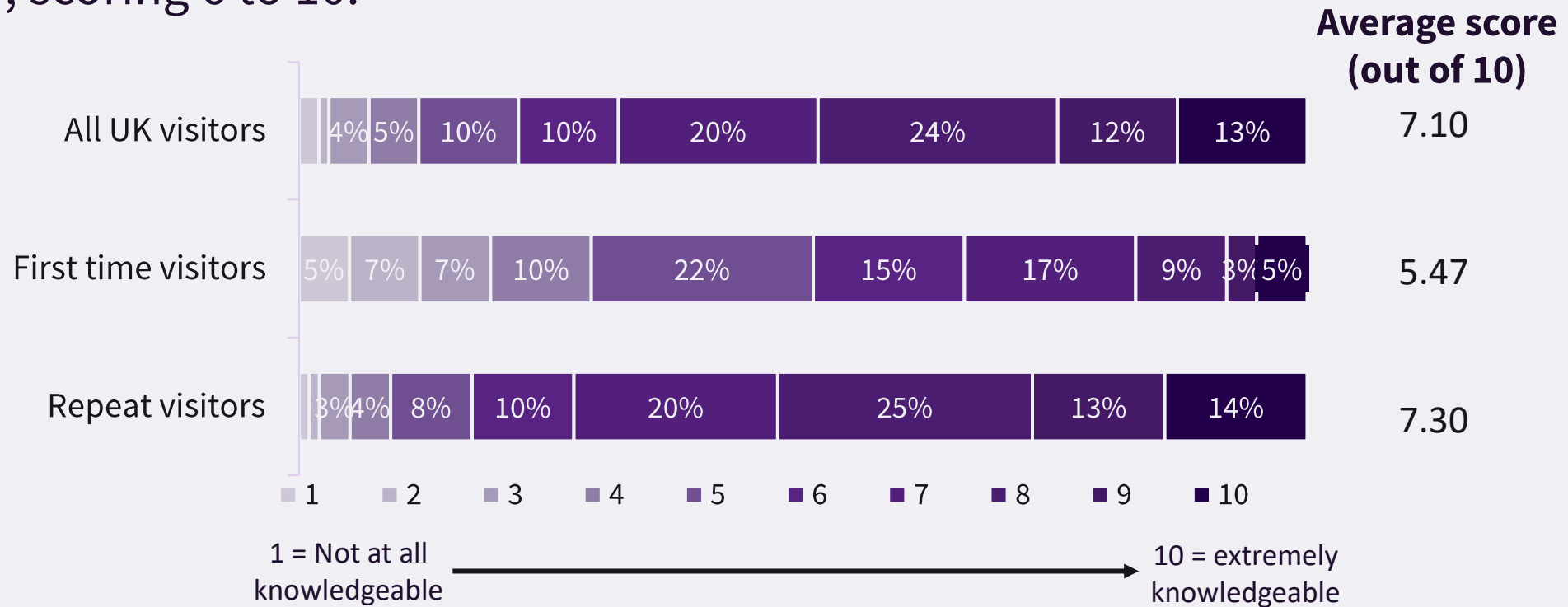
- Visitors from Scotland were more likely to have explored Scotland a lot in the past (78%), compared to those from the rest of the UK (46%).
- Younger respondents were the least likely to have explored Scotland a lot in the past (35%, compared to 59% of 55-64 and 63% of 65+).

Base (UK repeat visitors): 1,406

Q3 (Stage 2): To what extent have you explored Scotland in the past, before your most recent holiday or short break in Scotland?

# Knowledge of Scotland: UK visitors

Almost four fifths of UK visitors felt knowledgeable about where to go and what to do, with a quarter reporting that they have excellent knowledge, scoring 9 or 10. Amongst first time visitors, half felt they had reasonably good knowledge about Scotland before their trip, scoring 6 to 10.



Base (All): all UK visitors 1,531, first time visitors 128, repeat visitors 1,403  
Q4 (Stage 2): Before your recent holiday or short break in Scotland, how knowledgeable did you feel about where to go and what to do in Scotland when on a trip?

# 4.0 EUROPEAN VISITOR PROFILE

## 4.1 European Visitors: Key Demographics

- Visitors from Europe tended to be younger with a wider spread of ages than visitors from the UK or Long-Haul markets.
- There were a higher proportion of under 35's from Europe compared to other markets with pre-nesters making up 26% (highest share of all markets).
- Almost half of the remaining respondents were made up from the older independents lifestage (48%) with families (12%) and those of retirement age (12%) making up the remainder.
- More than three quarters of European visitors were in employment. European visitors were also more likely to be students/in education than other markets.
- 4% of Europeans had a long-term health condition, disability or infirmity.





## 4.2 European Visitors: Type of trip

- 91% were on a leisure trip with 8% visiting friends or relatives (1% 'other').
- 12% of Europeans were on a 'trip of a lifetime' with 21% on a 'special holiday or short break e.g. to celebrate a birthday or anniversary.
- 51% were on a regular short break or holiday with 14% on a 'one-off' trip.



## 4.3 European Visitors: Party Composition

- Almost two thirds of European visitors were travelling with their partner/spouse (65%)
- 16% were travelling with their child/children
- 5% were travelling with their parents or their partner's parents
- 12% were travelling with other members of their family
- 16% were travelling with friends
- 8% were travelling on their own
- 4% were travelling as part of an organised group/tour



## 4.4 European Visitors: Loyalty

- Overall, half of Europeans were on their first visit to Scotland with visitors from France (64%) more likely to be first time visitors to Scotland than people from Germany (45%).
- Respondents aged 16-34 (71%) were more likely to be first time visitors to Scotland than those aged 45+ (41%).
- Almost one in 10 respondents were regular visitors to Scotland, visiting at least once per year with a further fifth having visited several times before.
- Over a third of European respondents claimed to have explored Scotland extensively in the past.
- Almost a quarter claimed to have excellent knowledge about what to see and do in Scotland.



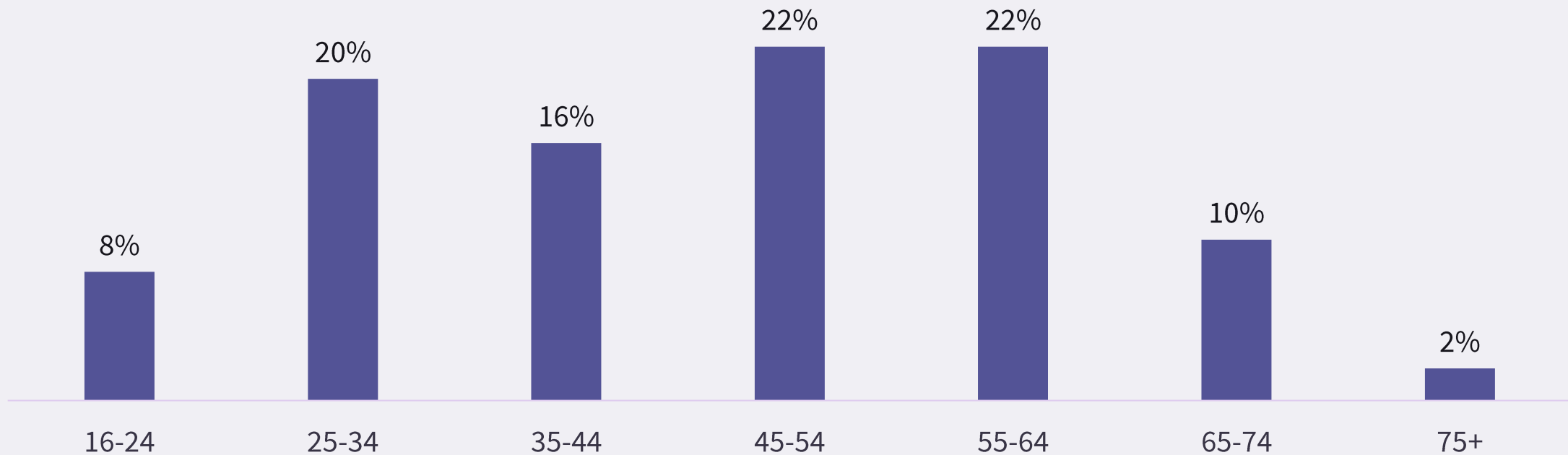
## 4.5 European Visitors: Trip characteristics

- More than a third of Europeans (35%) were staying in Scotland for up to a week (4-7 nights) with a further 39% staying between 8-14 nights. Only 6% were on a shorter break in Scotland (1-3 nights).
- 72% of Europeans toured around Scotland staying in 2 or more places with around a fifth staying in one urban, town or city location. Visitors from Southern Europe (Spain/Italy) were more likely to be staying in one urban location than those from Northern Europe.



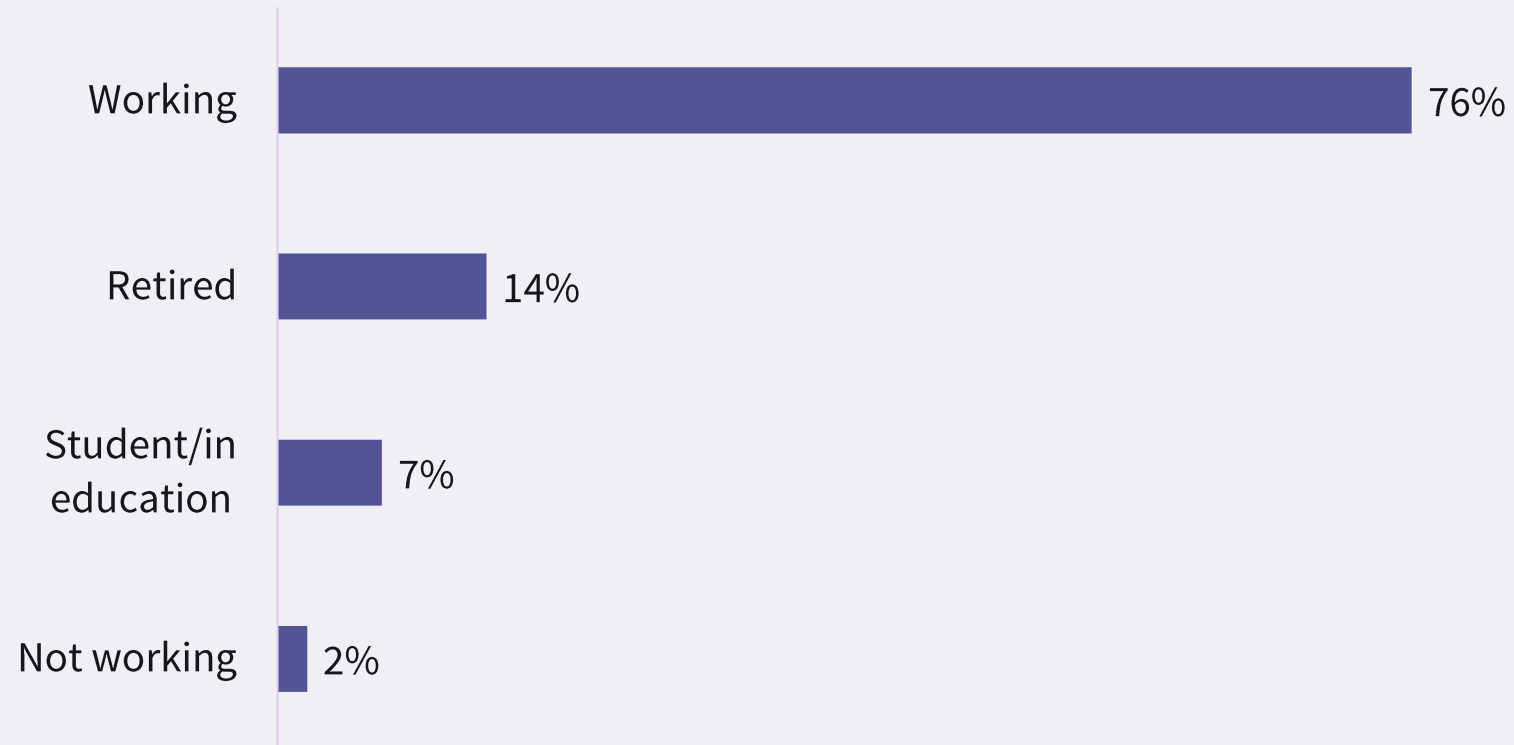
# Demographic profile: Europe visitors

The profile of European visitors was well spread across 25-64 age groups. There were more under 35 year old visitors from Europe, compared to UK and other overseas markets.



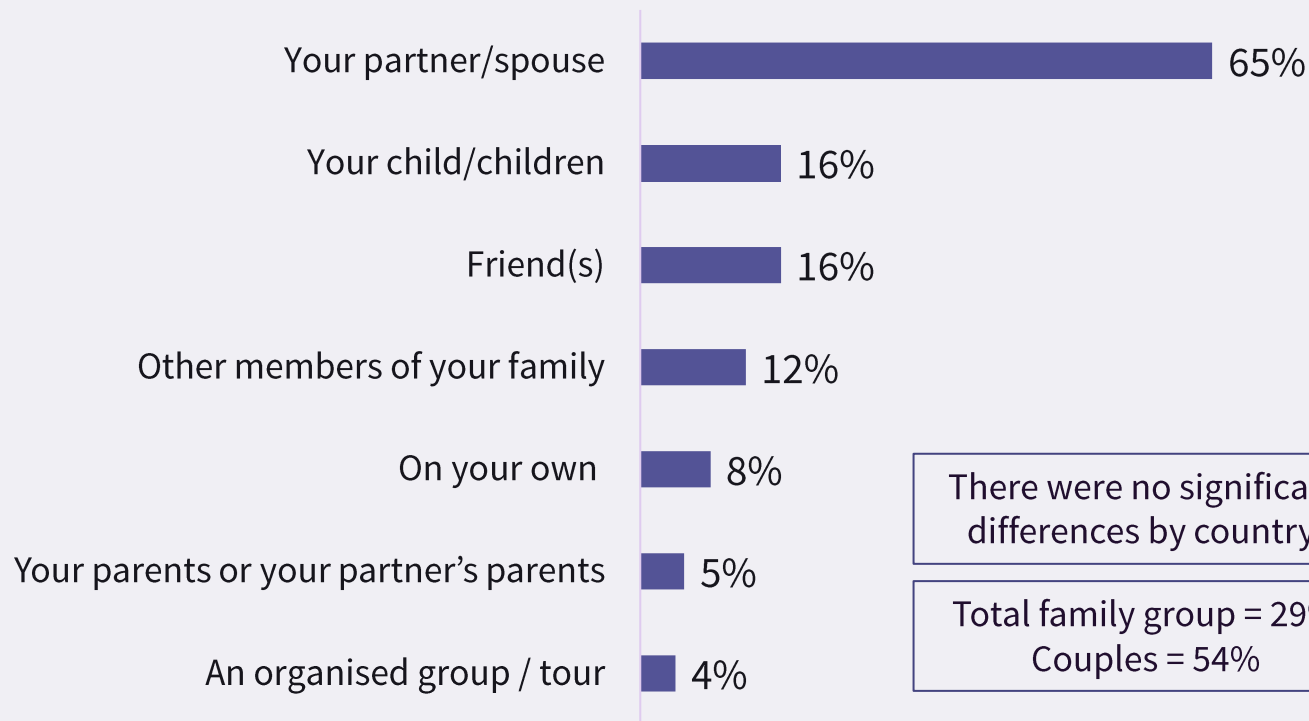
# Working status: Europe visitors

More than three quarters of Europe visitors were in work. A higher than average proportion were in work or education, compared to visitors from the UK and long-haul countries. Europe visitors were also more likely to be students.



# Party composition: Europe visitors

More than half of visitors from Europe were on holiday as a couple, while three tenths were in a family group and one tenth were travelling solo. In total, 14% had children under 16 years old in their group.



There were no significant differences by country.

Total family group = 29%  
Couples = 54%



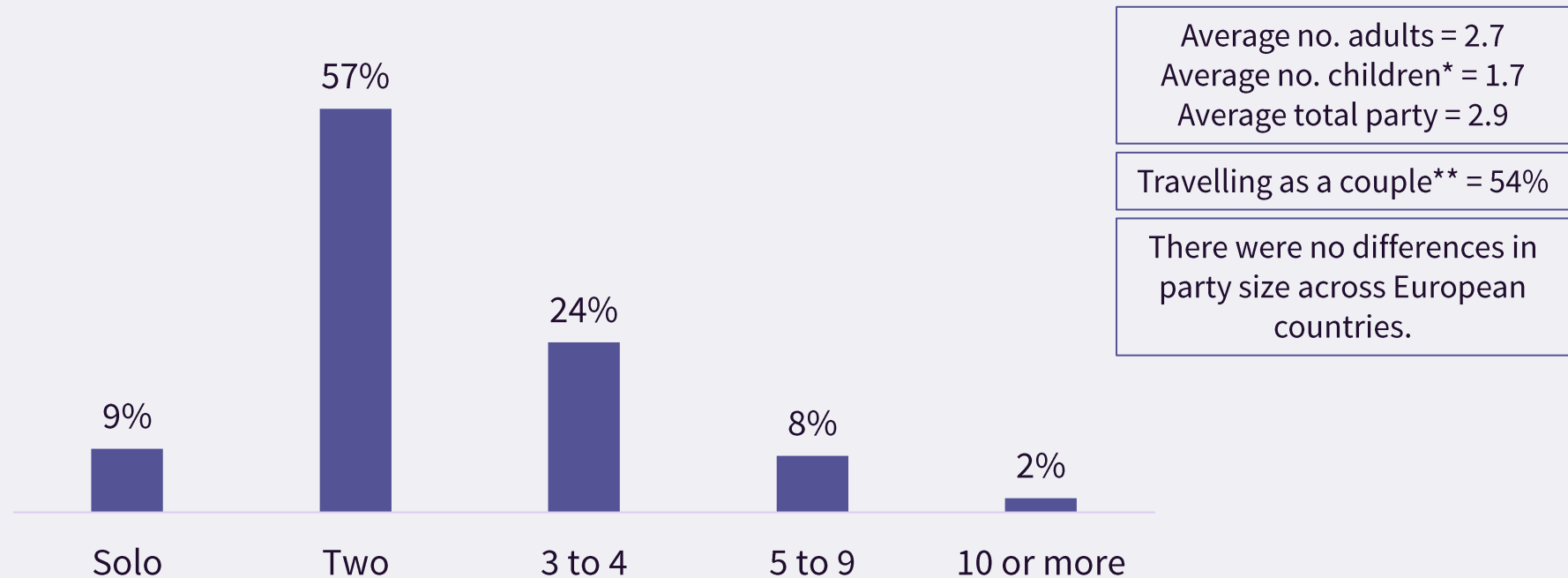
**14%**  
had children aged under 16 years old in their party



**3%**  
were travelling with pets or animals

# Overall number of people in party: Europe visitors

The largest proportion of Europe visitors were on holiday with one other person, while one in ten was travelling solo. For those with children, the average number in the group was just less than 2, while the overall average party size was 3 people.

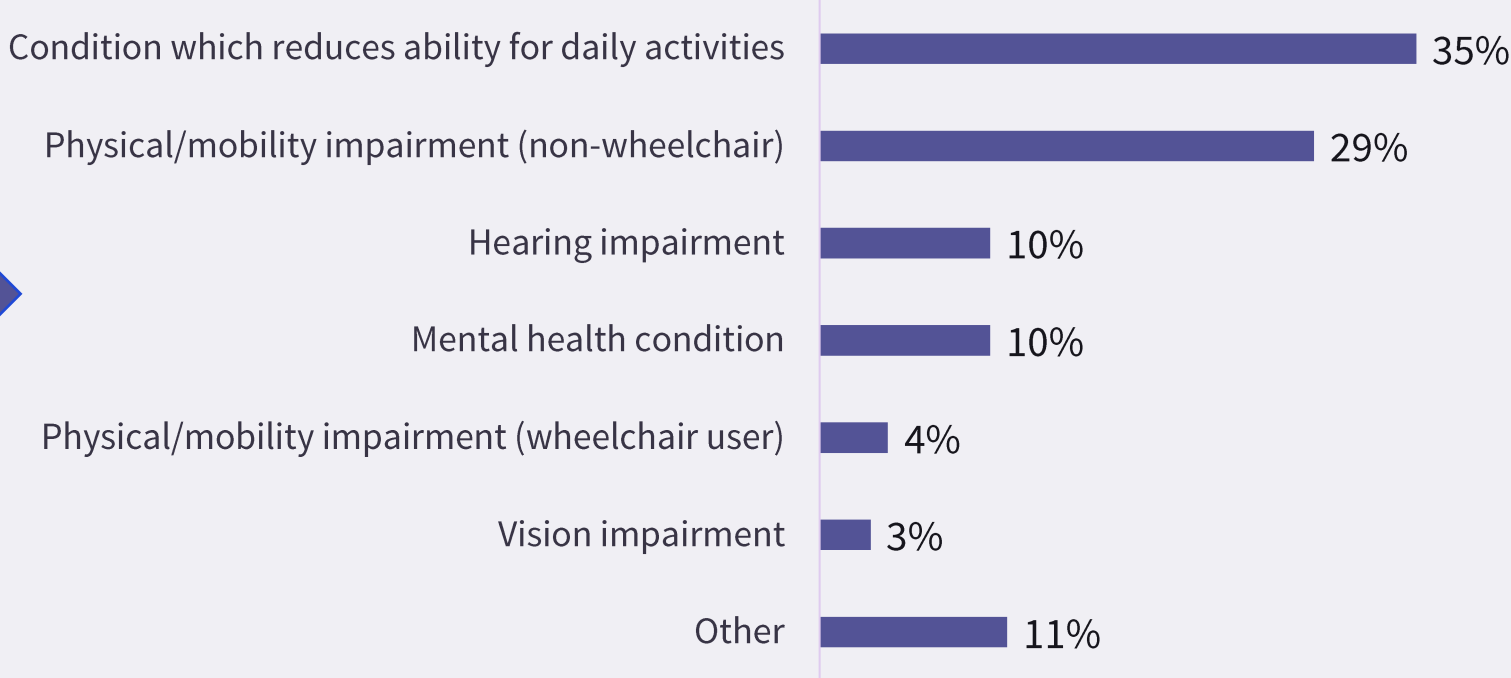




# Health conditions: Europe visitors

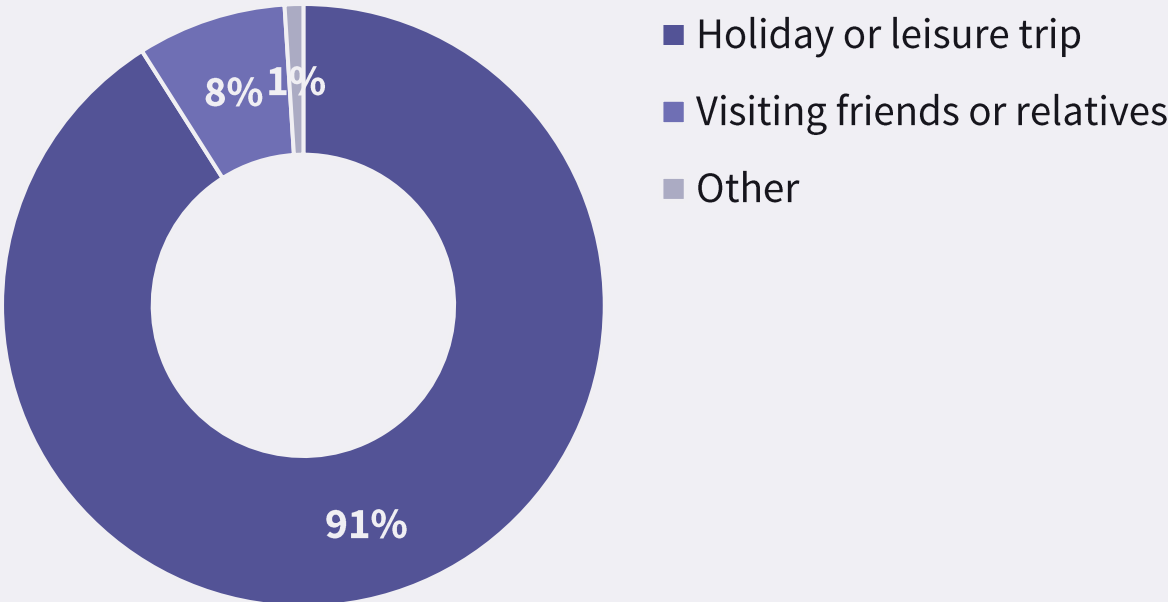
Only a small minority of European visitors had a long-term health condition. Amongst those who did, this tended to be an illness or condition that reduces ability to carry out day-to-day activities or a mobility impairment.

**4%**  
of respondents  
reported they have  
long-term health  
condition, disability or  
infirmity



# Main purpose of holiday or short break: Europe visitors

More than nine in ten Europe visitors stated the main reason for their holiday in Scotland was for leisure purposes.

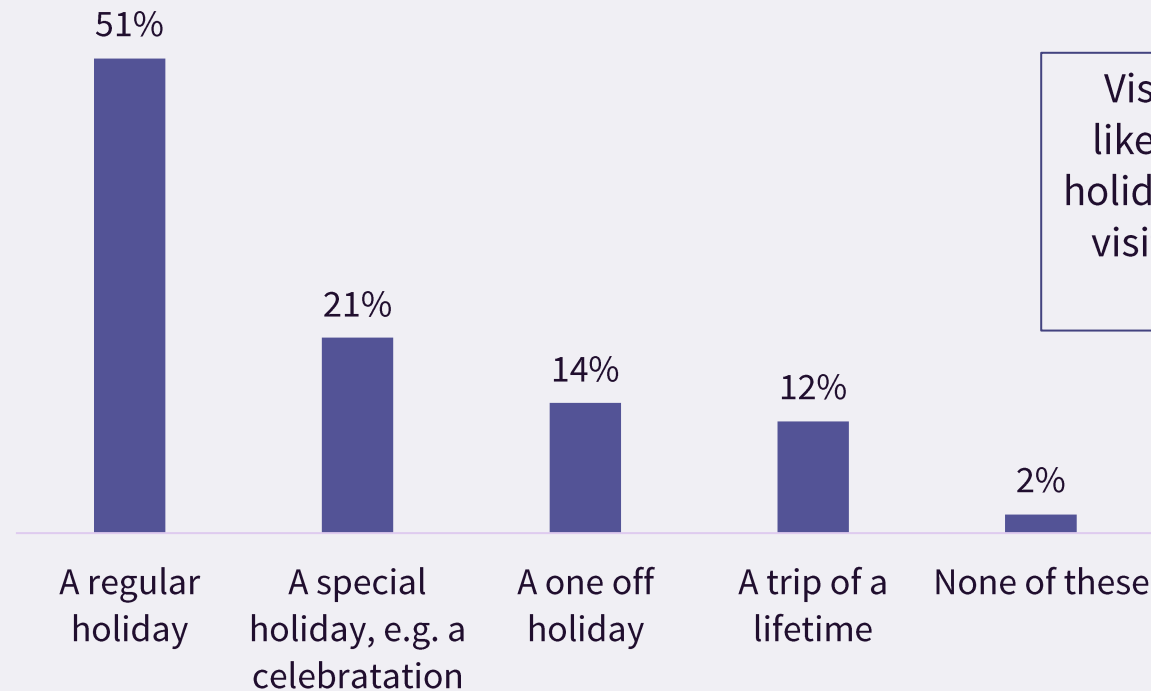


Visitors from Spain/Italy (11%) were more likely than those from Germany (6%) to report visiting friends and relatives.

3% of Europe visitors reported that they were combining a business trip with a holiday, and 1% were going to be working remotely during their trip.

# Type of holiday or short break: Europe visitors

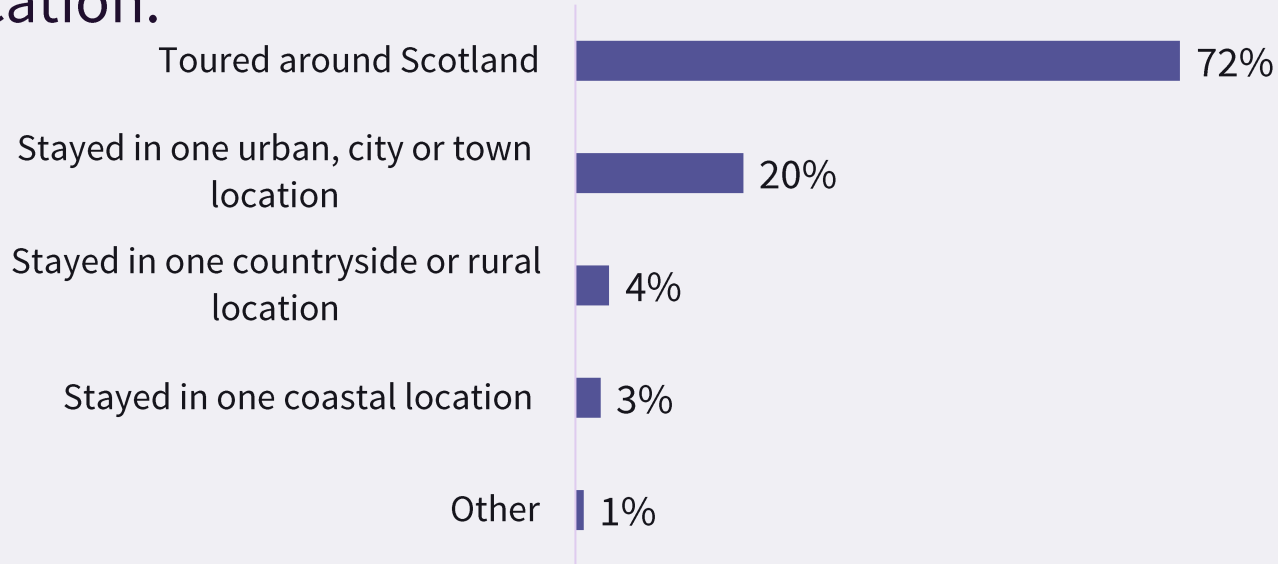
Half of Europe visitors reported that their trip to Scotland was a regular holiday, while a fifth were celebrating a special occasion. Over one in ten described their holiday as a trip of a lifetime.



Visitors from Spain/Italy were least likely to state they were on a regular holiday/short break (40%) compared to visitors from France (56%), Germany (59%) and Netherlands (54%)

# Multi or single destination trip: Europe visitors

Almost three quarters of Europe visitors reported touring around more than one location on their trip. Those who stayed in only one place tended to choose an urban location.

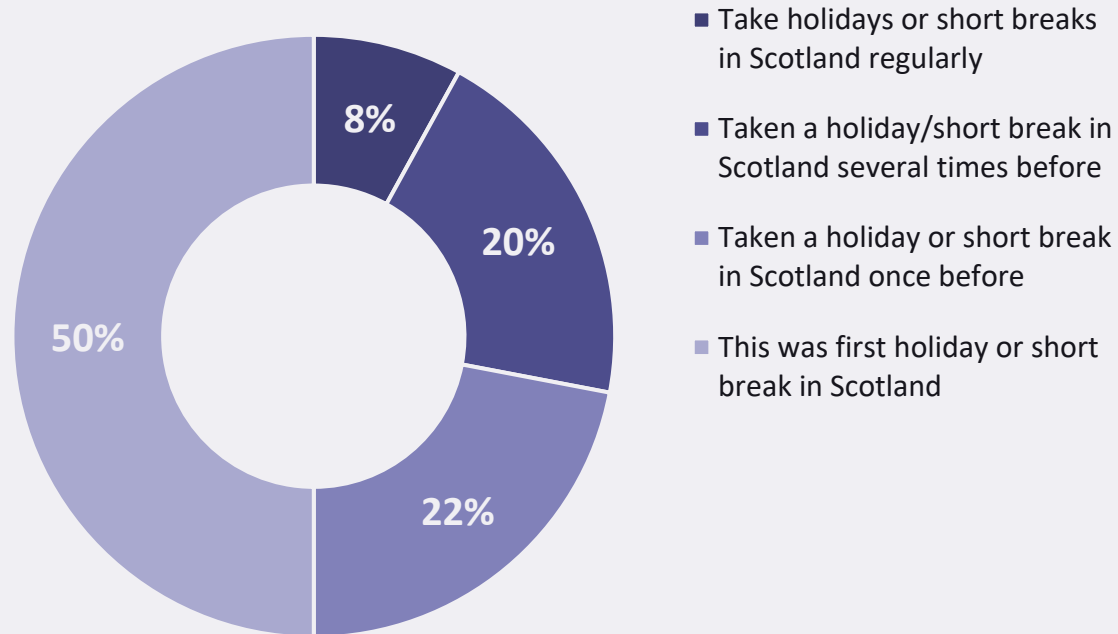


Visitors from Spain/Italy were more likely to stay in one urban location (25%) than those from France (8%) or the Netherlands (7%).



# Previous visits to Scotland: Europe visitors

Half of Europe visitors were first time visitors to Scotland, while almost one in ten were regular visitors.



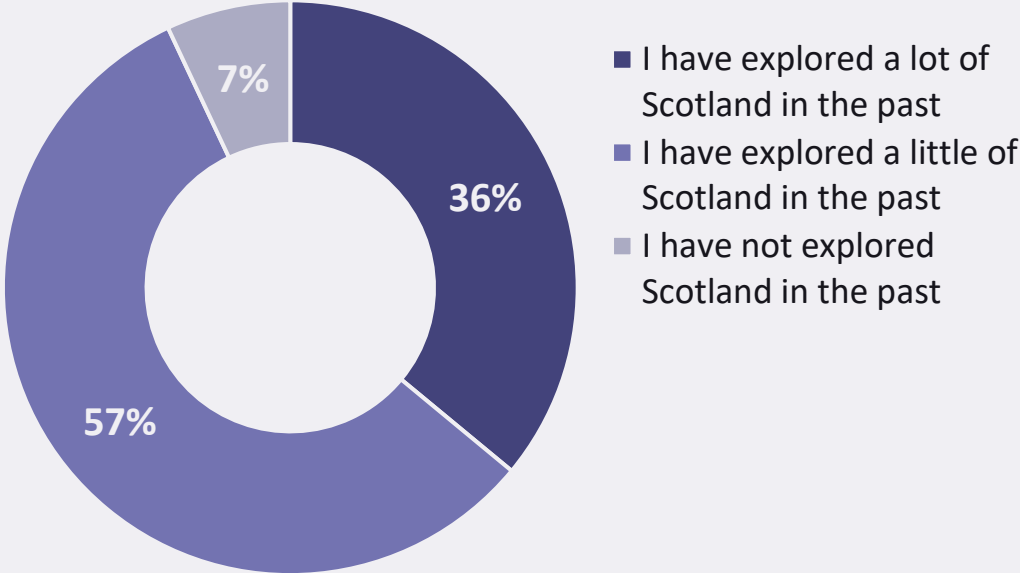
- Respondents aged 16-34 (71%) were the more likely to report that they were first time visitors to Scotland than those aged 45+ (41%).
- Visitors from France (64%) were also more likely to report that they were first time visitors, compared to those from Germany (45%).

Base (All Europe visitors): 625

Q2 (Stage 2): Was this recent trip the first time you have taken a holiday or short break in Scotland, or have you had a holiday or short break in Scotland before?

# Exploration of Scotland: Europe visitors

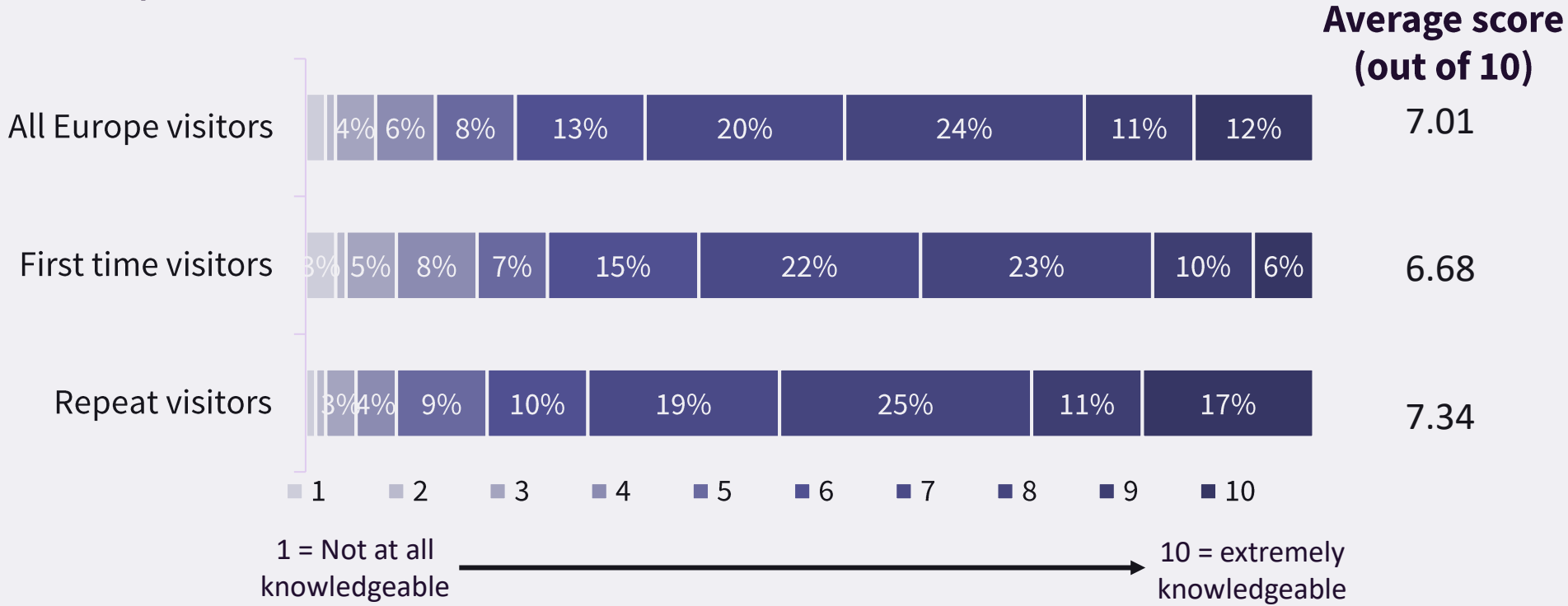
Just over a third of repeat visitors from Europe had explored Scotland extensively in the past.



Base (Europe repeat visitors): 322  
Q3 (Stage 2): To what extent have you explored Scotland in the past, before your most recent holiday or short break in Scotland?

# Knowledge of Scotland: Europe visitors

Four fifths of visitors from Europe felt knowledgeable about where to go and what to do, with almost a quarter reporting that they have excellent knowledge, scoring 9 or 10. Even amongst first time visitors, most felt they had good knowledge about Scotland before their trip.



Base (All): all Europe visitors 625, first time visitors 306, repeat visitors 319  
 Q4 (Stage 2): Before your recent holiday or short break in Scotland, how knowledgeable did you feel about where to go and what to do in Scotland when on a trip?

## 5.0 LONG HAUL VISITOR PROFILE

Interpretation Note: Long Haul Definition: USA, Canada, Australasia



## 5.1 Long Haul Visitors: Key Demographics

- Long-haul visitors tended to be older with more than half aged 55+ .
- Almost three in 5 long-haul respondents (59%) were in employment with more than a third retired (35%).
- Long-haul visitors were in the older lifestages with 47% older independents and 30% of retirement age. 7% were families with 15% pre-nesters .
- 6% of long-haul respondents had a long-term health condition, disability or infirmity.



## 5.2 Long Haul Markets: Type of trip

- 87% were on a leisure trip with 12% visiting friends or relatives (1% 'other').
- Long-haul respondents were much more likely to state that they were on a 'trip of a lifetime' (29%) than other markets with a further 33% on a 'special holiday or short break e.g. 'to celebrate a birthday or anniversary'.
- 30% were on a regular short break or holiday with 8% on a 'one-off' trip.



## 5.3 Long Haul Visitors – Party Composition

- Three in 5 long haul visitors were travelling with their partner/spouse (61%)
- 11% were travelling with their child/children
- 5% were travelling with their parents or their partner's parents
- 19% were travelling with other members of their family
- 15% were travelling with friends
- 9% were travelling on their own
- 5% were travelling as part of an organised group/tour



## 5.4 Long Haul Markets: Loyalty

- Overall, just over three in five long haul travellers (61%) were on their first visit to Scotland.
- A higher proportion of visitors from the USA (68%) were first time visitors than those from Canada (54%) or Australasia (47%).
- Visitors from Australasia were most likely to be repeat visitors to Scotland (53%) with 27% claiming to have visited Scotland several times before.
- Canadian travellers are also more likely to be repeat visitors (46%) than visitors from the USA (32%).
- Long haul visitors aged 16-34 (83%) and 15-44 (75%) were more likely to be visiting Scotland for the first time in 2023, than those aged 55+ (54%).



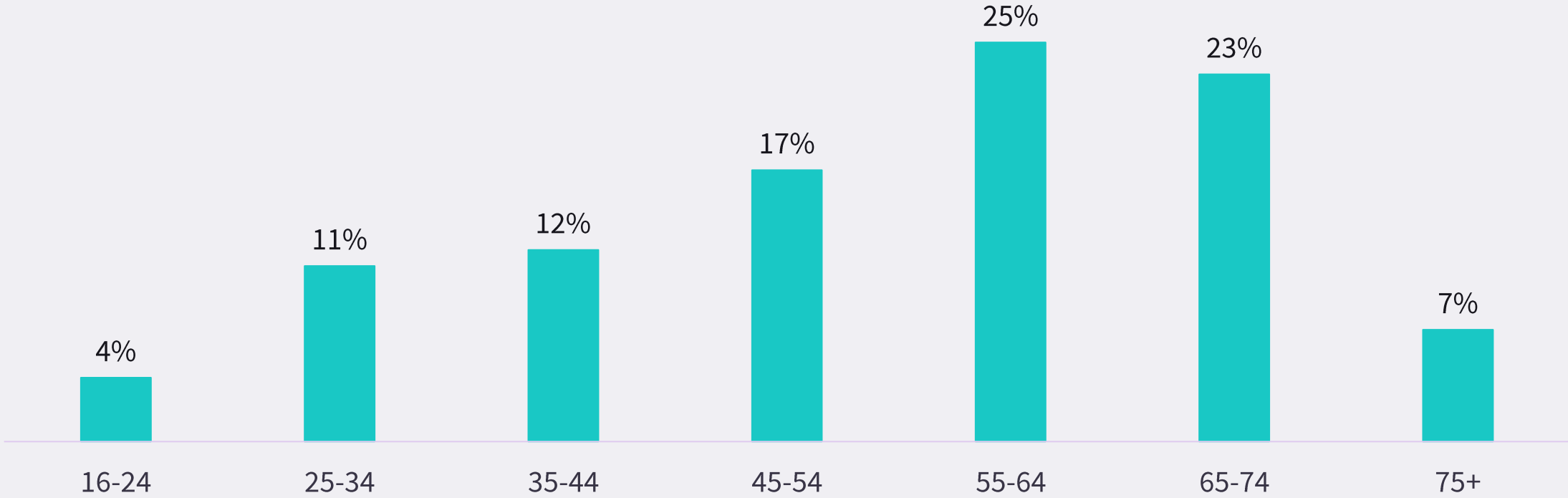
## 5.5 Long Haul Markets: Trip Characteristics

- As for Europeans, long-haul visitors were also staying in Scotland for a longer time period than UK visitors.
- A quarter of long-haul visitors were staying more than 14 nights with a further 40% staying 8-14 nights. Visitors from Australasia were more likely to be staying for longer compared to other markets (43% staying for more than 14 nights).
- 80% of long-haul respondents were touring around Scotland staying in two or more places.
- 15% were staying in one urban, city or town location with Canadians most likely to be staying in an urban environment (19%).
- Long-haul visitors are less likely to be staying in one countryside, rural or coastal location than other markets.



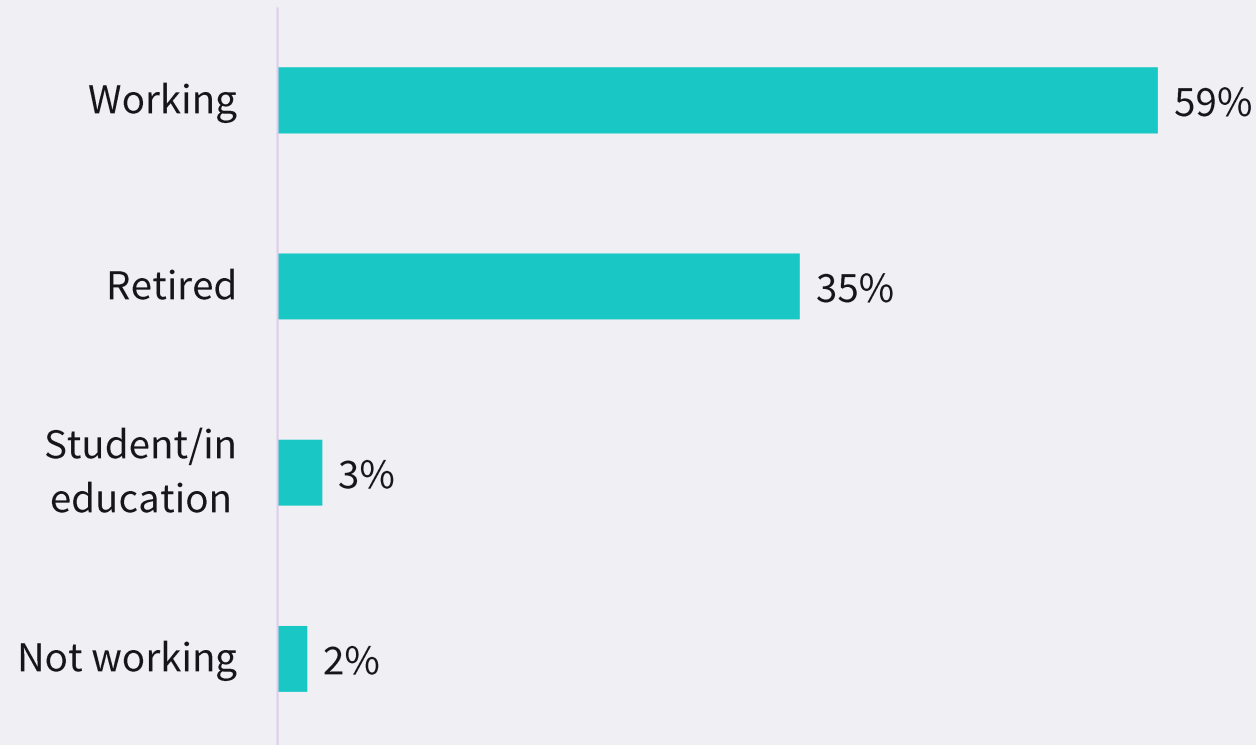
# Demographic profile: Long haul visitors

Similar to UK visitors, long haul visitors tended to be within older age groups with more than half aged 55+.



## Working status: Long haul visitors

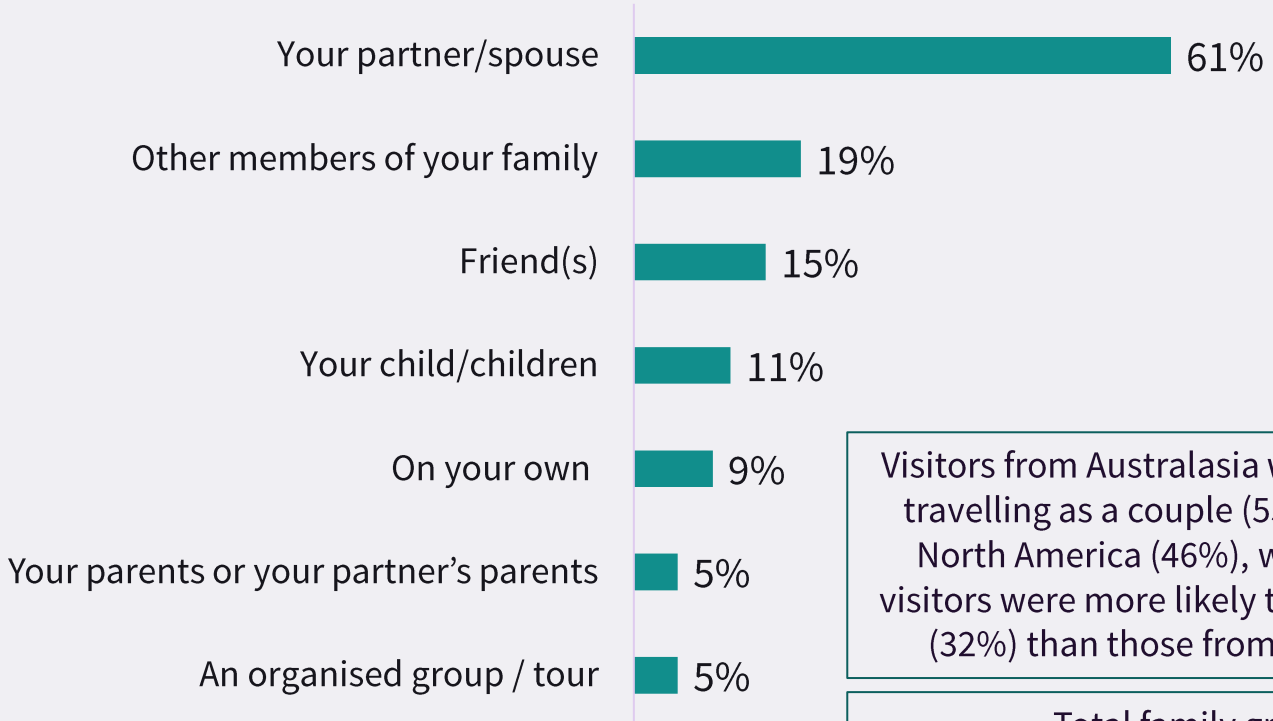
The working profile of long haul visitors was similar to those from the UK, with three in five in work and more than a third retired. Long haul visitors were less likely to be in employment and more likely to be retired than Europe visitors.



Base (Stage 1 - all long-haul visitors): 2,581

# Party composition: Long haul visitors

Almost half of long haul visitors were visiting Scotland as a couple, with three tenths travelling with a family group. In total, around one in ten had children under 16 years old in their group.



Visitors from Australasia were more likely to be travelling as a couple (55%) than those from North America (46%), while North America visitors were more likely to be in a family group (32%) than those from Australasia (25%).

Total family group = 30%  
Couples = 48%



9%  
had children aged under 16 years old in their party



<1%  
were travelling with pets or animals

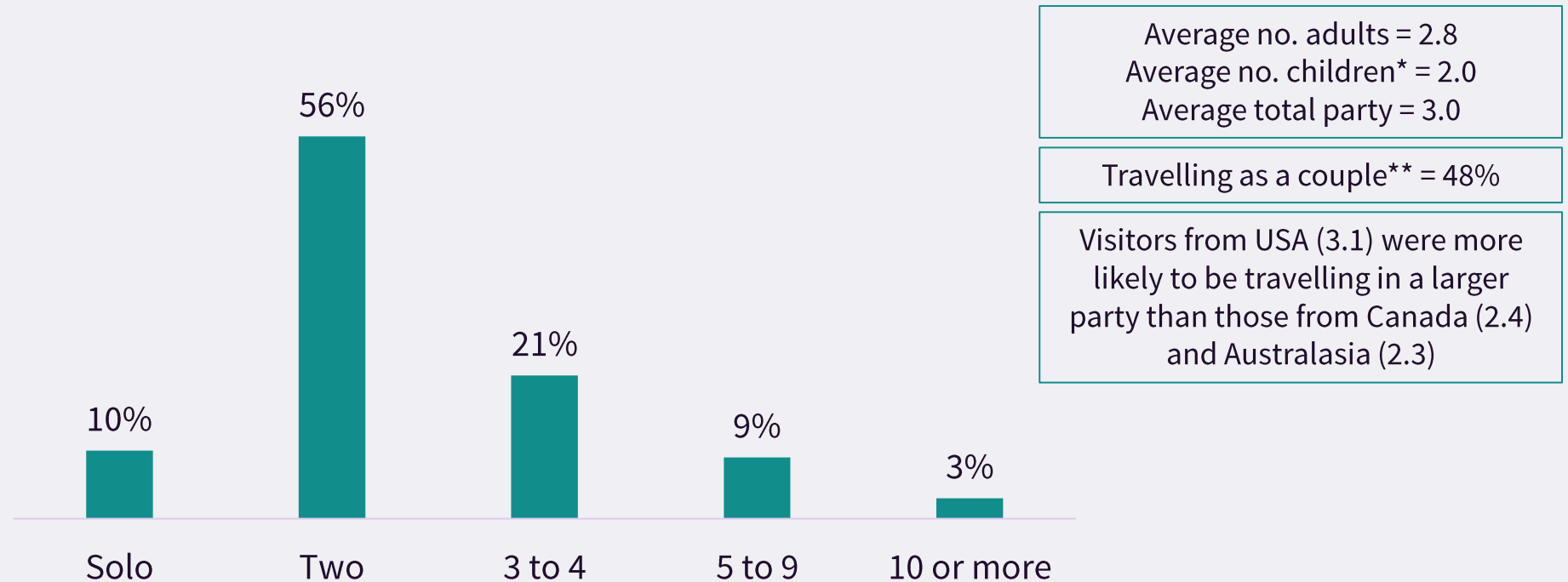
Base (All Long haul visitors): 2,581

Q5 (Stage 1): Which of the following best describes who is with you on your trip?; Q6 (Stage 1): Are there any children aged under 16 in your immediate travel party?; Q8a (Stage 1): Are you travelling with any pets or animals?



# Overall number of people in party: Long haul visitors

Over half of long haul visitors were on holiday with one other person, while one in ten was travelling solo. For those with children, the average number in the group was 2, while the overall average party size was 3 people.



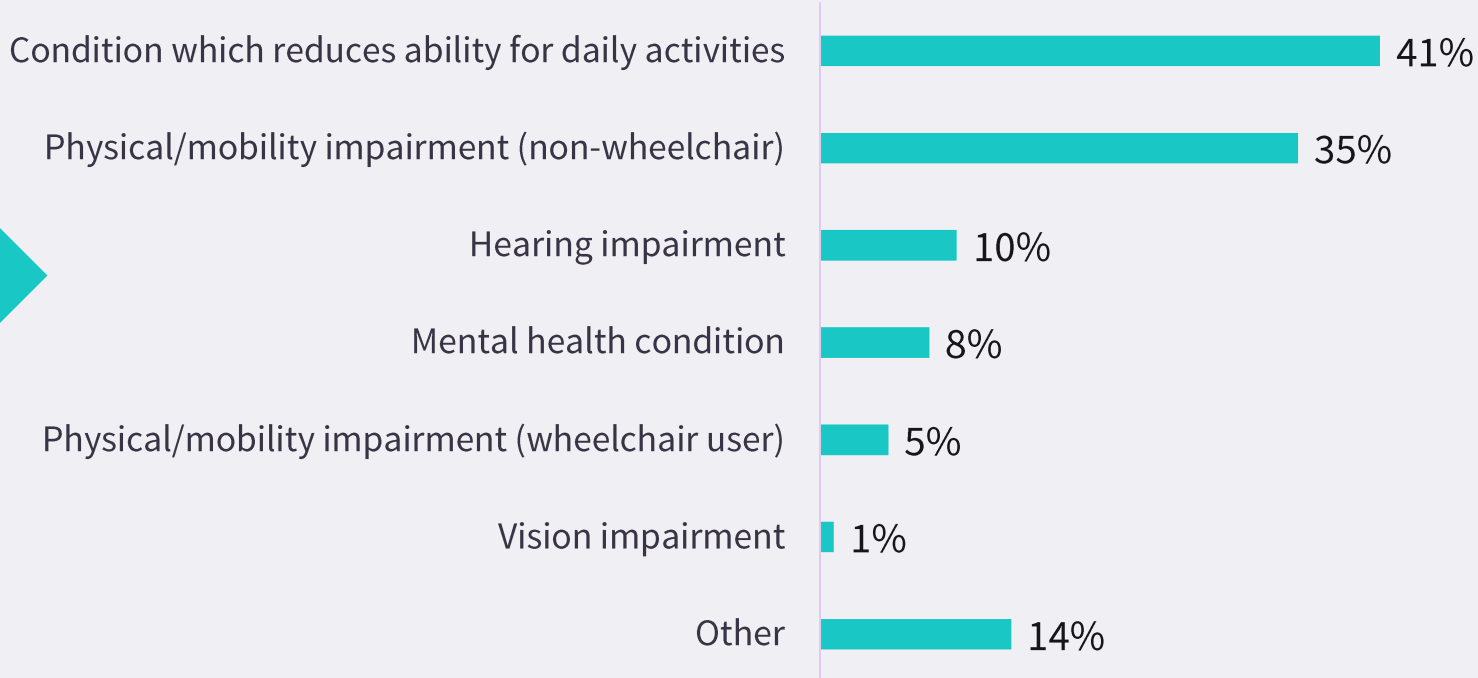
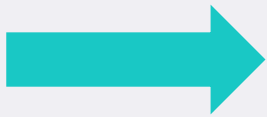
\*Average number of children based only on sample with children in party

\*\* Couple defined as those travelling in a party of 2 where other person is partner/spouse

# Health conditions: Long haul visitors

Similar to visitors from Europe, a minority of long haul visitors had a long-term health condition. This was most likely to be an illness or condition that reduces ability to carry out day-to-day activities or a mobility impairment.

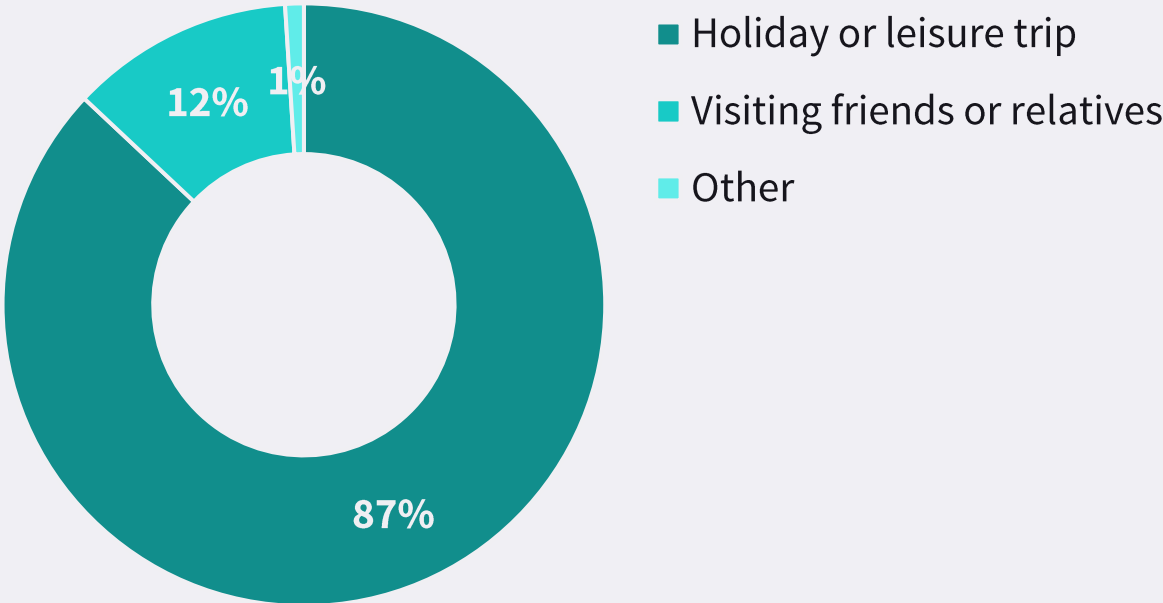
**6%**  
of respondents  
reported they have  
long-term health  
condition, disability or  
infirmity



QD4 (Stage 1): Do you have a long-term health condition, disability or infirmity? Base (all Long haul, excluding prefer not to say): 2,499  
QD5 (Stage 1): Which, if any, of the following health conditions or impairments do you have? Base (those with a health condition, excluding pnnts): 124

# Main purpose of holiday or short break: Long haul visitors

Almost nine in ten long haul visitors stated the main reason for their holiday in Scotland was for leisure purposes, with 12% visiting friends or relatives.

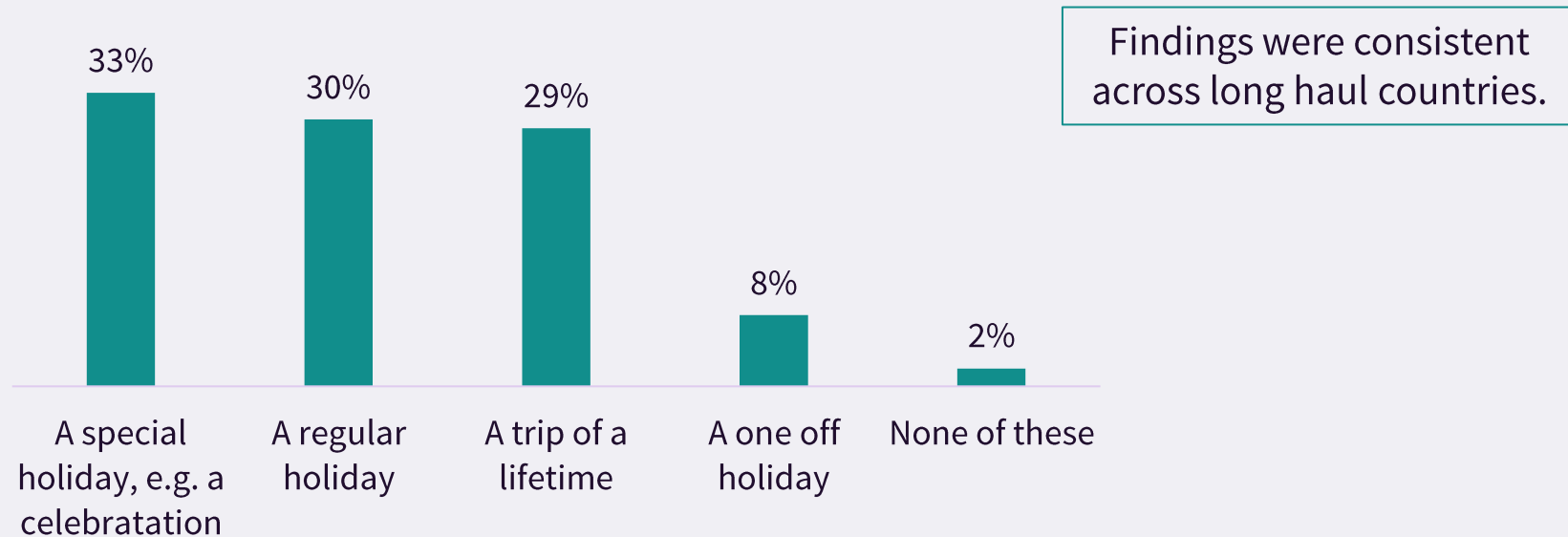


Those visiting from Australasia (18%) and Canada (15%) were more likely to be visiting friends or relatives than those from the USA (8%).

In total, 4% of long haul visitors reported that they were combining a business trip with a holiday, and 1% were going to be working remotely during their trip.

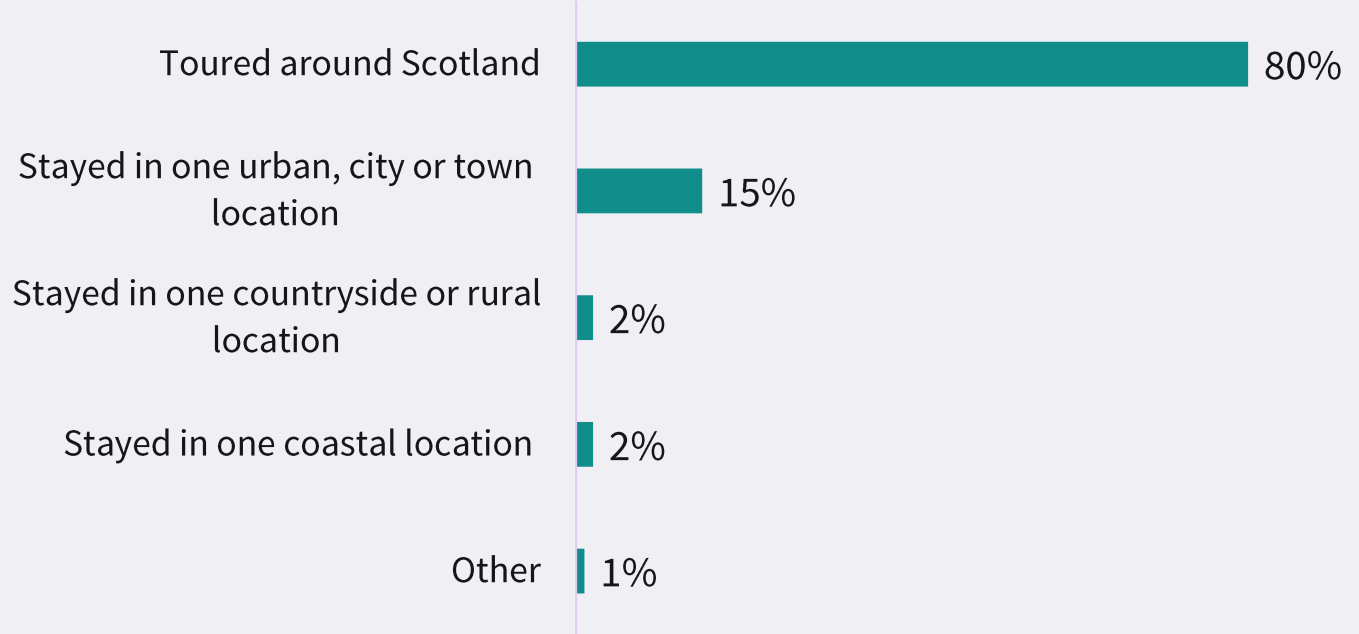
# Type of holiday or short break: Long haul visitors

Long haul visitors were fairly evenly split between those describing their trip as a holiday to celebrate a special occasion, a regular holiday and a trip of a lifetime.



# Multi or single destination trip: Long haul visitors

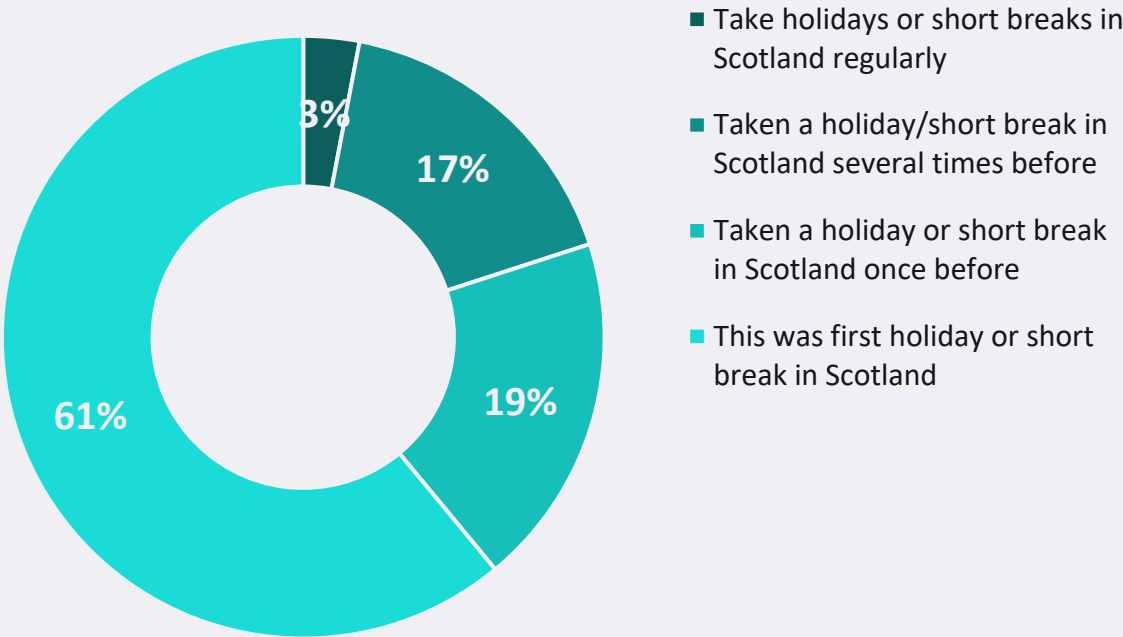
The large majority of long haul visitors stayed in more than **one location on their trip**. Those who stayed in **only one place** tended to choose a city or urban location.



There were no differences by long haul countries.

# Previous visits to Scotland: Long haul visitors

The majority of long haul visitors were visiting Scotland for the first time in 2023.



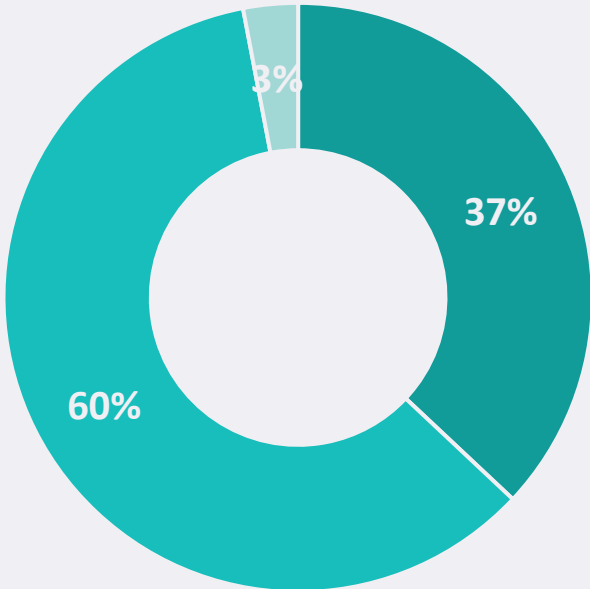
- Long haul visitors aged 16-34 (83%) and 15-44 (75%) were more likely to be visiting Scotland for the first time in 2023, than those aged 55+ (54%).
- A higher proportion of visitors from the USA (68%) were first time visitors than those from Canada (54%) or Australasia (47%).

Base (All Long haul visitors): 795

Q2 (Stage 2): Was this recent trip the first time you have taken a holiday or short break in Scotland, or have you had a holiday or short break in Scotland before?

# Exploration of Scotland: Long haul

Amongst long haul visitors who had visited Scotland before, over a third had explored Scotland extensively in the past.



- I have explored a lot of Scotland in the past
- I have explored a little of Scotland in the past
- I have not explored Scotland in the past

Base (Long haul repeat visitors): 324  
Q3 (Stage 2): To what extent have you explored Scotland in the past, before your most recent holiday or short break in Scotland?



# Knowledge of Scotland: Long haul visitors

Two thirds of long haul visitors felt knowledgeable about where to go and what to do, although only a minority felt they have excellent knowledge, scoring 9 or 10. Amongst first time visitors, over half felt they had reasonably good knowledge about Scotland before their trip, scoring 6 to 10.

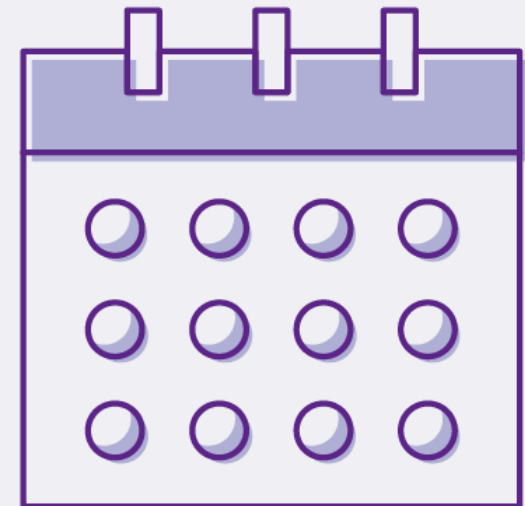


Base (All): all Long haul visitors 795, first time visitors 452, repeat visitors 343  
 Q4 (Stage 2): Before your recent holiday or short break in Scotland, how knowledgeable did you feel about where to go and what to do in Scotland when on a trip?



# 6.0 Definitions used within this report

- Within this report, **the term visitor is used to refer to respondents to the survey**. Data has been weighted to reflect the profile of visitors to Scotland and its regions using the national statistical monitors (Great Britain Tourism Survey and International Passenger Survey). More detail is available within a separate Background and Methodology report.
- **Within this report the following market definitions apply**
  - UK: respondents resident in Scotland or the rest of UK
  - Europe: respondents resident in Scotland’s core markets of France, Germany, Spain, Italy, Netherlands and any other European country
  - Long haul: respondents resident in USA, Canada and Australasia
- **Within this report the following life stage definitions apply**
  - Pre nesters: respondents aged 16 to 34 with no children
  - Families: respondents aged 16 to 64 with children in the travel party
  - Older independents: respondents aged 35 to 64 with no children
  - Retirement age: respondents aged 65 and over





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## Contact Us:

Insight Department

[visitscotland.org](https://visitscotland.org)

[visitscotland.com](https://visitscotland.com)

[research@visitscotland.com](mailto:research@visitscotland.com)

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April 2024