

SCOTLAND VISITOR SURVEY 2023

ACCOMMODATION

1. What type of accommodation did visitors choose on their trip in Scotland?
2. Awareness and usage of environmentally accredited accommodation
3. What methods did visitors use to book their accommodation?
4. How satisfied were visitors with aspects of their accommodation?

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 its regions



Contents

Accommodation

[Background](#)

[Key Insights](#)

1. [Type of accommodation used in Scotland](#)

- 1.1 All Visitors
- 1.2 Sub samples
- 1.3 UK Visitors
- 1.4 European Visitors
- 1.5 European Markets (internal only)
- 1.6 Long Haul Visitors

2. [Environmental/Green Accreditation](#)

3. [Method used to book accommodation in Scotland](#)

- 2.1 Market Comparison
- 2.2 UK Visitors
- 2.3 Long Haul Visitors
- 2.4 European Visitors

4. [Visitor satisfaction with accommodation](#)

- 3.1 All Visitors
- 3.2 UK Visitors
- 3.3 European Visitors
- 3.4 Long Haul Visitors

5. [Definitions](#)

Accommodation definitions used within this report



Serviced accommodation:

Hotel/Motel/Inn
Restaurant with rooms

Guest House/B&B
Serviced Apartment

Non serviced accommodation:

Self catering accommodation (whole of property or unit)
Friend's or relatives homes
Rental of private home (room only)
Second home or time share
Caravan, camping and glamping

Private home:

Staying with friends/relatives
Rental of a room in someone's private home
Second home

Caravan, camping and glamping:

Campervan or motorhome
Camping (campsite or wild)
Touring or Static Caravan
Glamping or alternative accommodation

All 'other' accommodation types are not included in the above nets i.e. hostel, farmhouse, other.

Key Insights: Accommodation

- In terms of context for this report, many of Scotland's visitors (and in particular European and long haul visitors) may have used different types of accommodation in different regions as part of a touring trip in Scotland.
- We know that accommodation is an important part of the visitor experience and for UK visitors in particular, we are aware that the particular accommodation itself can be the motivator for taking the holiday or short break in Scotland.
- 6% of UK visitors overall stated a particular hotel or other accommodation was the reason for their trip. This is even higher for Scotland residents with 15% claiming the specific accommodation was the attraction.



Key Insights:

Accommodation type

- Almost six in ten of all visitors (57%) opted for serviced accommodation, with hotels being the most popular choice (50%). Self catering rental was chosen by almost a third (31%) with over a fifth (21%) choosing to stay in 'someone's private home' (either with friends or family or a private room rental).
- UK visitors are more likely to stay in non-serviced accommodation compared to overseas visitors. This includes rented houses, cottages or lodges, and friend's or relative's homes.
- Long-haul visitors are particularly likely to choose hotels and less likely to use non-serviced accommodation compared to other visitor groups.
- First-time visitors are more likely than repeat visitors to favour more traditional accommodation types such as hotels and guest houses. Repeat visitors are more likely than first-timers to choose alternative accommodation options such as camping, rented houses and friends' or relatives' homes.
- Families with children showed a preference for non-serviced accommodation, possibly due to wanting more flexibility, space and cooking facilities.



Key Insights: Environmentally Accredited Accommodation

- Only a small proportion of visitors (6%) actively looked for accommodation with green/environmental accreditation.
- However, 11% noted that they stayed in accommodation that had green/environmental credentials.
- Visitors from Europe (13%) and long haul markets (19%) were more likely to have stayed in accommodation with green accreditation than those from the UK (8%).
- However, these differences are likely to be driven by the higher proportions of these markets staying in hotels, where accreditation is more common.



Source: [Sustainable Tourism Project](#)



Key Insights:

Accommodation booking method

- Booking directly with the accommodation provider is the most popular method used by UK visitors, while European and long-haul visitors tend to favour the use of intermediaries.
- Long-haul visitors rely the most on the use of intermediaries, likely favouring this booking method due to distance and unfamiliarity with Scottish providers.
- Repeat visitors from the UK and Europe are more likely to book directly with the accommodation provider rather than use an intermediary.
- Pre-nesters favour the use of online marketplaces and online travel agents to book their trip, while families and older independent visitors prefer direct bookings.



Key Insights:

Satisfaction with accommodation

- Visitors who stay in paid accommodation during their visit are generally satisfied with all aspects. The overall welcome, the service provided by staff, and cleanliness are the points that visitors rate the highest.
- Although UK, European and long-haul visitors are all generally satisfied with their accommodation, long-haul visitors tend to give the highest scores across all aspects, whereas European visitors tend to give the lowest scores.
- In terms of long-haul, visitors from the USA seem to be the most satisfied market with Scotland's accommodation offering, whereas from the European market, visitors from the Netherlands seem to be the least satisfied overall.



1.0 TYPE OF ACCOMMODATION USED IN SCOTLAND

1. Accommodation type

In this section, we wanted to understand what type of accommodation visitors to Scotland stayed in.

- Whether serviced or non-serviced was more popular
- Whether long haul, Europe and UK visitors had different preferences
- Whether first time visitors and repeat visitors had different preferences

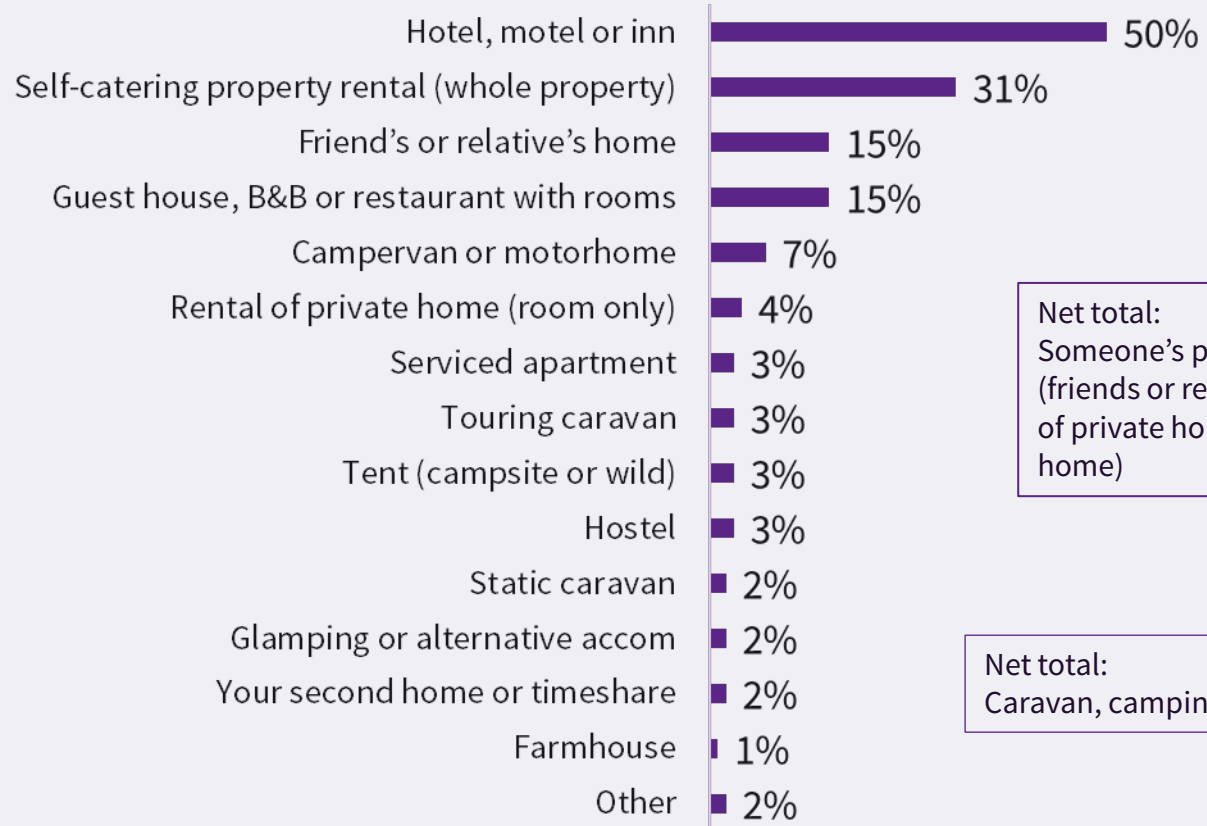


1.1 Type of accommodation used

Overall, non-serviced accommodation was slightly more popular than serviced, though it's possible both were used on the same trip. This may be due to the high proportion of visitors from the UK who have a preference for non-serviced. This may also be driven by the cost of living crisis affecting the domestic market post Covid.

Net total:

Serviced accommodation:	57%
Non-serviced accommodation:	61%



Net total:
Someone's private home: 21%
(friends or relatives home, rental of private home (room), second home)

Net total:
Caravan, camping or glamping: 16%

Base (All – Stage 2): 3,011

Q30 (Stage 2): What type of accommodation did you stay in during your trip?

Please note: totals may not add to 100% due to visitors staying in more than one type of accommodation during their trip.

1.2 Type of Accommodation used: market differences

- UK visitors were less likely to stay in serviced accommodation (48%) than those from Europe (69%) or long haul (83%)
- Long haul visitors were particularly likely to choose hotels (76%) compared to European visitors (59%) and those from the UK (43%).
- Those on a 'trip of a lifetime' were also more likely to choose hotels (67%) and B&B/Guesthouses (29%)
- Scotland residents (35%) were the least likely to stay in a hotel, motel or inn



1.2 Accommodation used by lifestage

Families were more likely to favour self-catering properties (41%) than older life stage groups (older independents 30%, retirement age 28%) likely due to the additional flexibility this gives them.

A higher-than-average proportion of pre-nesters (perhaps due to their budget) stayed in other accommodation such as hostels (10%), compared to other older life stage groups (older independents 5%, retirement age 5%).



Accommodation Used: Top ten

Visitors may stay in one or multiple types of accommodation during their visit



50%

hotel, motel
or inn



31%

self catering
rental (whole
property)



15%

friends or relatives
homes



15%

guesthouse, B&B or
restaurant with rooms



7%

campervan or
motorhome



4%

rental or private
home (room
only)



3%

serviced
apartment



3%

touring
caravan



3%

tent
(campsite or wild)

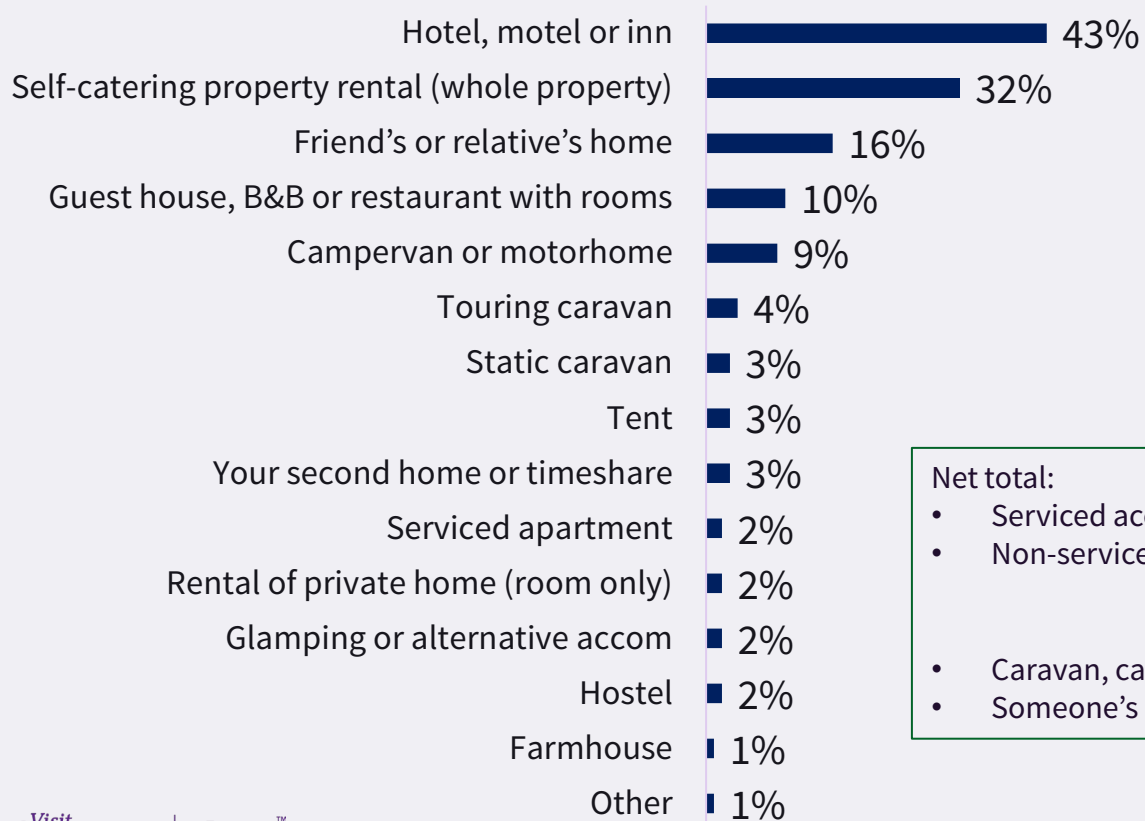


3%

hostel

1.3 Accommodation: UK visitors

Although hotels was the most popular individual accommodation type, UK visitors were more likely overall to choose non-serviced accommodation. In total, two thirds of UK visitors stayed in non-serviced accommodation compared to half of overseas visitors (51%).



Net total:

- Serviced accommodation = 48%
- Non-serviced accommodation = 66%

- Caravan, camping, or glamping = 20%
- Someone's private home = 20%

- UK visitors were more likely to stay in non-serviced accommodation (66%) than those from Europe (55%) or long haul (47%) markets.
- Visitors from Scotland (35%) were less likely to stay in a hotel, motel or inn than those from the rest of the UK (45%).

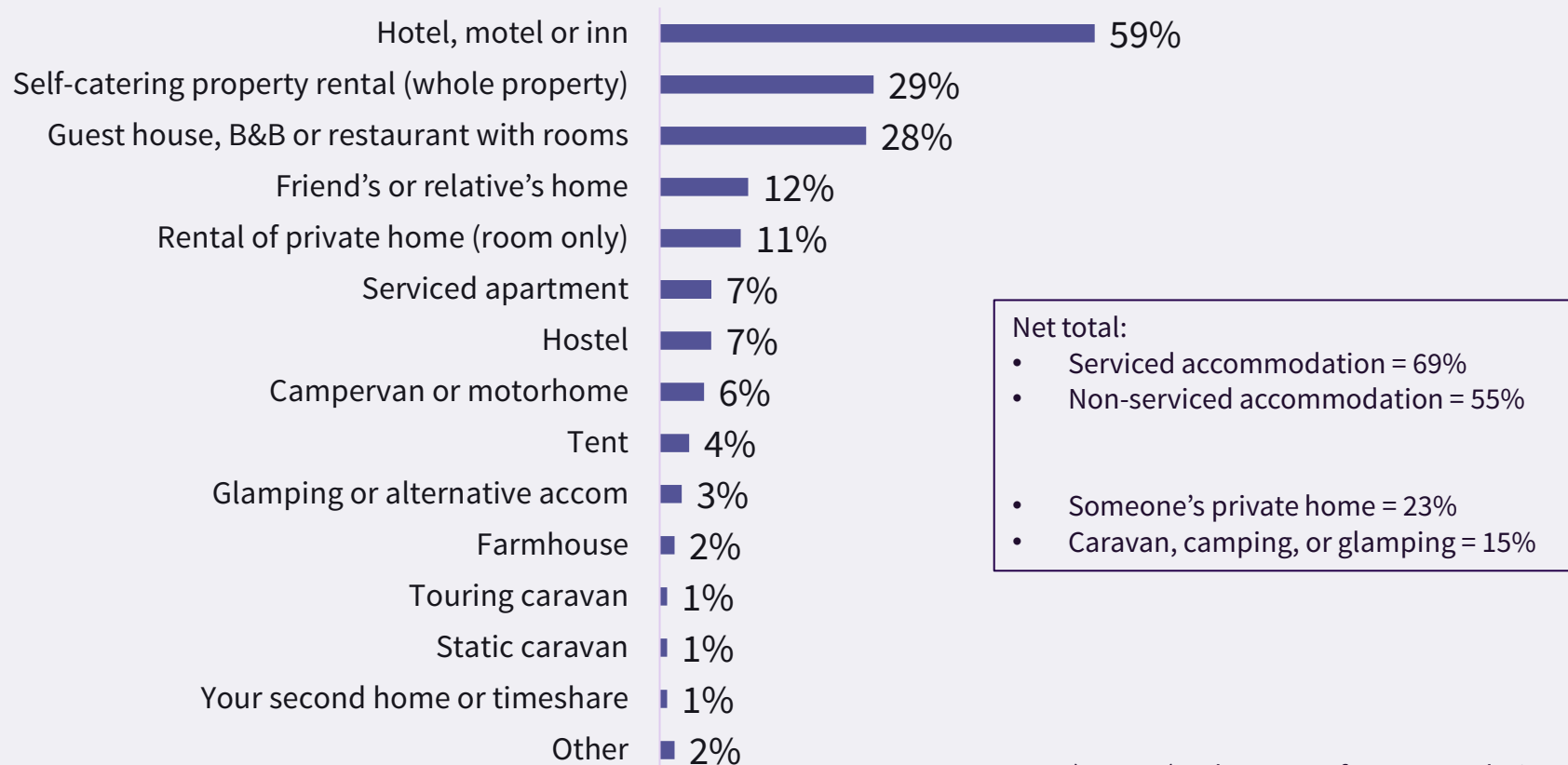
Base (All UK visitors): 1,531

Q30 (Stage 2): What type of accommodation did you stay in during your trip?

Please note: totals may not add to 100% due to visitors staying in more than one type of accommodation during their trip.

1.4 Accommodation: Europe visitors

More than two thirds of Europe visitors stayed in serviced accommodation during their trip, while over half stayed in non-serviced, suggesting many stayed in more than one place and a mix of accommodation types were used.



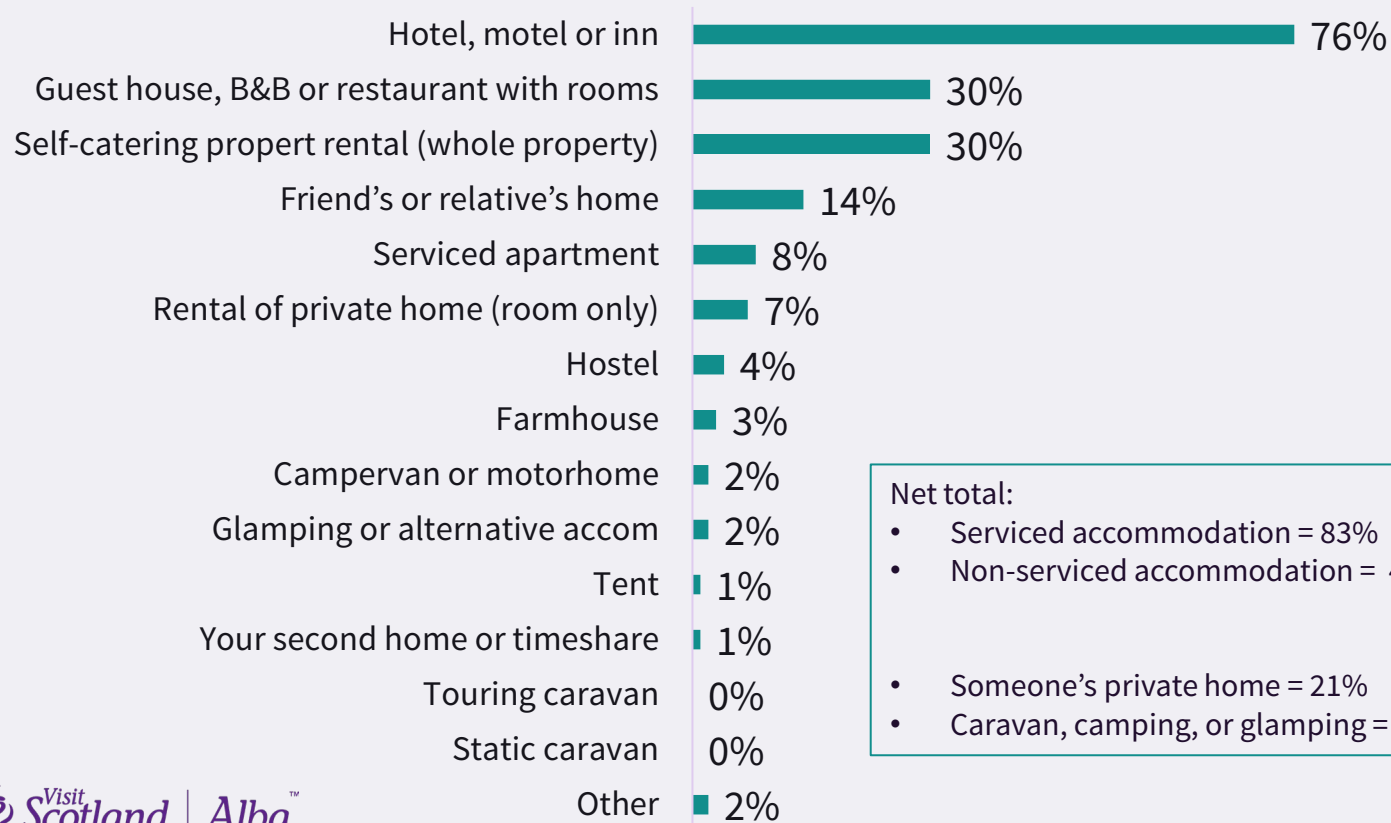
Base (All Europe visitors): 625

Q30 (Stage 2): What type of accommodation did you stay in during your trip?

Please note: totals may not add to 100% due to visitors staying in more than one type of accommodation during their trip.

1.6 Accommodation: Long haul visitors

Serviced accommodation was especially popular for long haul visitors, particularly hotels – more so than for visitors from the UK or Europe.



Net total:

- Serviced accommodation = 83%
- Non-serviced accommodation = 47%

- Someone's private home = 21%
- Caravan, camping, or glamping = 5%

- Visitors from Australasia were more likely to stay in a guest house or B&B (40%) than those from the USA (28%) or Canada (24%).
- A higher than average proportion of Australasia visitors reported staying with friends and family (27%) than USA (9%) or Canada (15%) visitors.

Base (All Long haul visitors): 795

Q30 (Stage 2): What type of accommodation did you stay in during your trip?

Please note: totals may not add to 100% due to visitors staying in more than one type of accommodation during their trip.

2.0 Environmental/green accreditation

In this section, we wanted to understand the visitor's usage of accommodation with green/environmental accreditation.

- Whether visitors actively sought out accommodation with green/environmental credentials
- The proportion who did stay in accommodation that had green/environmental accreditation.
- Whether there were differences by market or lifestage



2.1 Environmentally accredited accommodation

Only a small minority of visitors actively looked for accommodation with green accreditation, although a higher proportion noted that they did stay in green accommodation.

6%

specifically looked for accommodation with green/environmental accreditation



11%

stayed in accommodation with green/environmental accreditation

- The proportion looking for green accredited accommodation was consistent across markets: UK (5%), Europe (8%), long haul (6%)
- Visitors from Europe (13%) and long haul markets (19%) were more likely to have stayed in accommodation with green accreditation than those from the UK (8%).
- Higher proportions of first time visitors (14% vs. 10% repeat visitors) and those on the trip of a lifetime (18%, vs not 11%) stayed in environmentally accredited accommodation.
- These differences are likely to be driven by the higher proportions of these sub-groups staying in hotels, where accreditation is more common.
- There was also a greater likelihood amongst those staying in rural areas (11%) or touring (14%), compared to those staying in urban areas (7%).

Base (stayed in paid accommodation): 2,761

Q33 (Stage 2): Did you specifically look for accommodation in Scotland that had green or environmental accreditation when booking?; Q34 (Stage 2): Did any of the accommodation you stayed in in Scotland have green or environmental accreditation?

2.2 What were the characteristics of those who looked for environmentally accredited accommodation?

Although there were little differences between markets, Scotland residents were more likely than the rest of the UK (and other further afield markets) to have looked for accredited accommodation (9% versus 4% rest of UK)

Those aged over 55 were more likely than younger age ranges to look for environmentally accredited accommodation (60% of those who looked)

Of those looking, almost 2 in 5 (42%) succeeded in staying in accommodation with accreditation with a further 42% being unsure.

Base (All – Stage 2): 3,011
Q33 (Stage 2): Did you specifically look for accommodation in Scotland that had green or environmental accreditation when booking?



Environmentally accredited accommodation: UK visitors

Although only 5% of UK visitors actively sought accommodation with green accreditation, a slightly higher proportion reported that they stayed in such accommodation.

5%

specifically looked for accommodation with green/environmental accreditation



8%

stayed in accommodation with green/environmental accreditation

Visitors from Scotland were more likely than those from the rest of the UK to look for environmentally accredited accommodation (9% vs. 4% rest of UK) and to stay in environmentally accredited accommodation (11% vs. 7% rest of UK).

Environmentally accredited accommodation: Europe visitors

Almost one in ten Europe visitors looked for green accreditation when booking their accommodation, while one in eight stayed in accredited accommodation.

8%

specifically looked for accommodation with green/environmental accreditation



13%

stayed in accommodation with green/environmental accreditation

There were no differences across European countries in the proportions looking for or staying in environmentally accredited accommodation.

Environmentally accredited accommodation: Long haul visitors

Amongst long haul visitors there was a large discrepancy between the proportion actively seeking environmental accreditation and those staying in such accommodation.

6%

specifically looked for accommodation with green/environmental accreditation



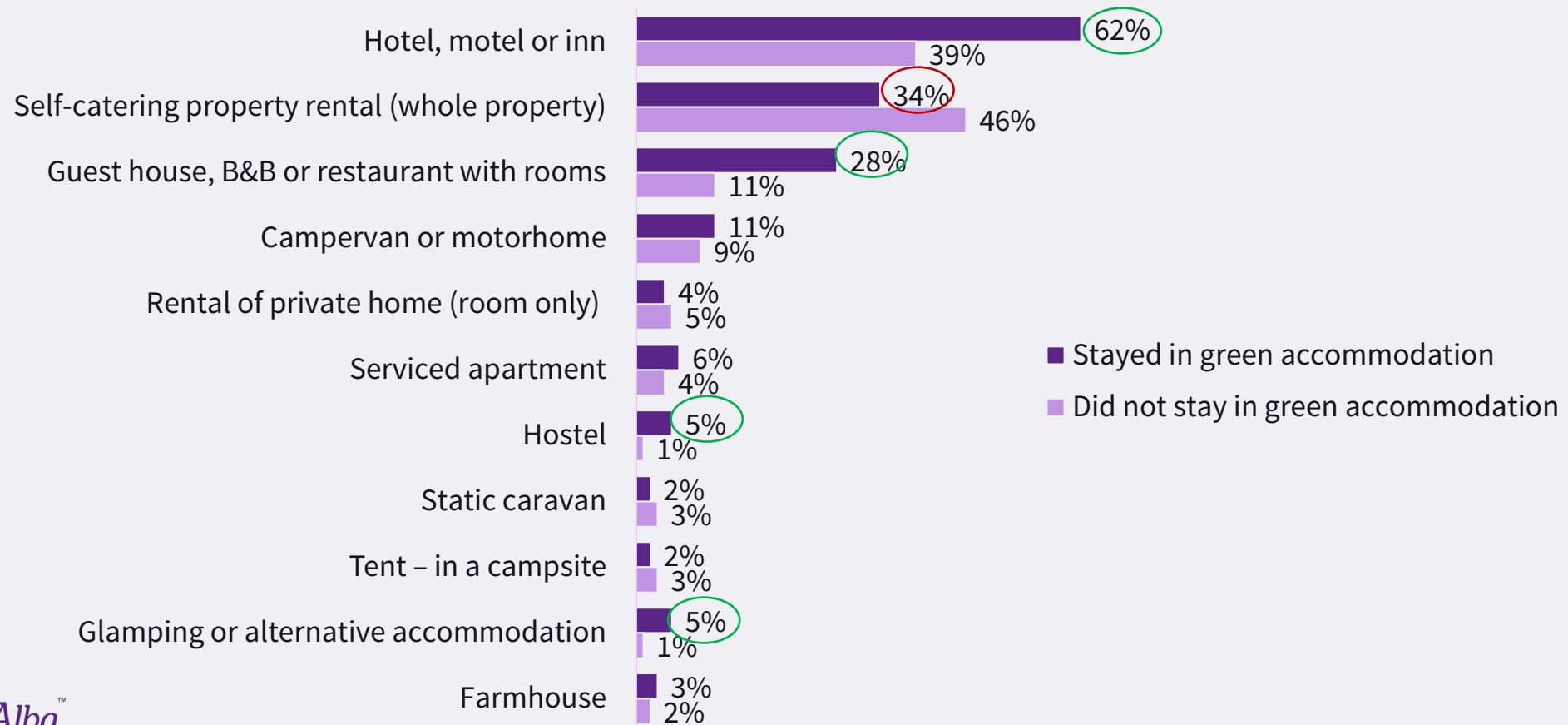
There were no differences across long haul countries in the proportions looking for or staying in environmentally accredited accommodation.

19%

stayed in accommodation with green/environmental accreditation

Environmental accreditation by accommodation type

Higher than average proportions of visitors who stayed in hotels, B&Bs, hostels and glamping accommodation reported they had stayed in environmentally accredited accommodation. Those staying in self-catering properties were less likely to report this.



3.0 METHODS USED TO BOOK ACCOMMODATION IN SCOTLAND

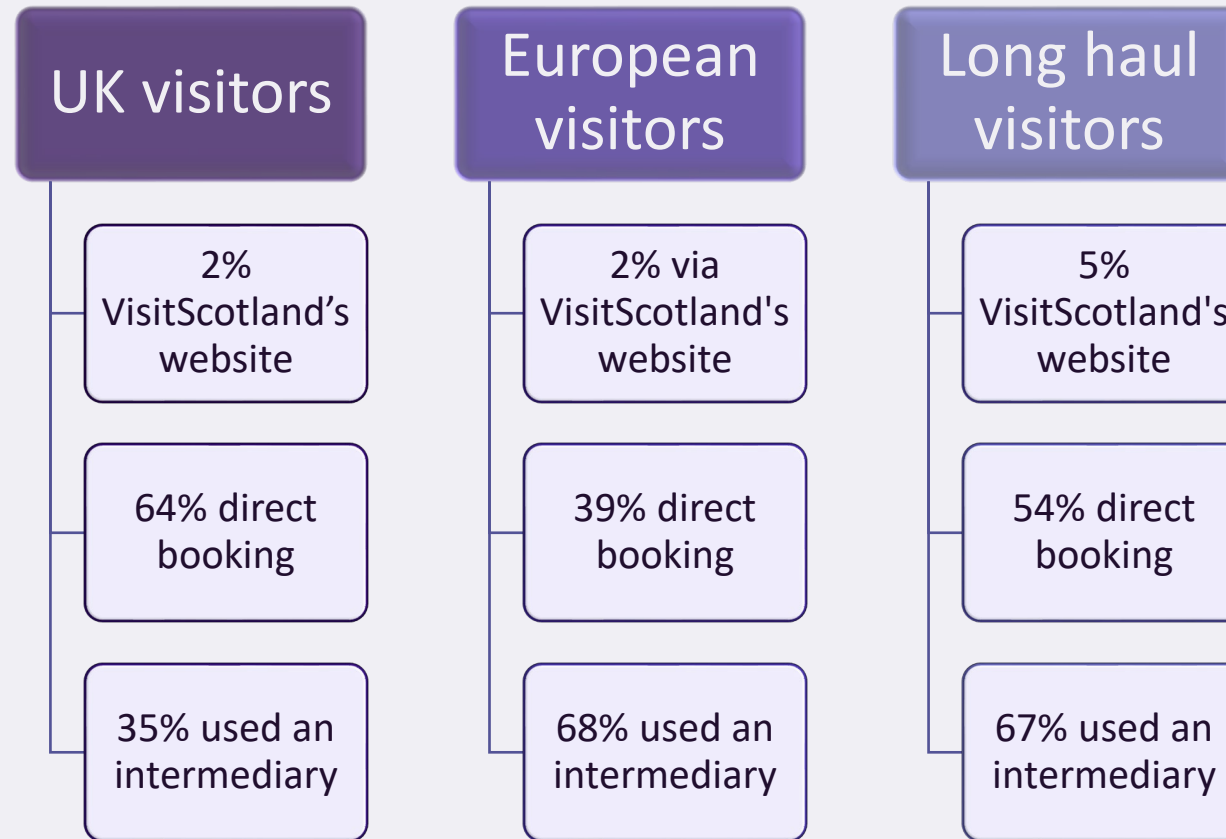
3. Booking method

In this section, we wanted to understand how visitors booked their accommodation in Scotland:

- Booking method used
- Did visitors book directly with the accommodation provider or through an intermediary?
- How do region of residence, previous travel experience to Scotland and life stage impact booking method?



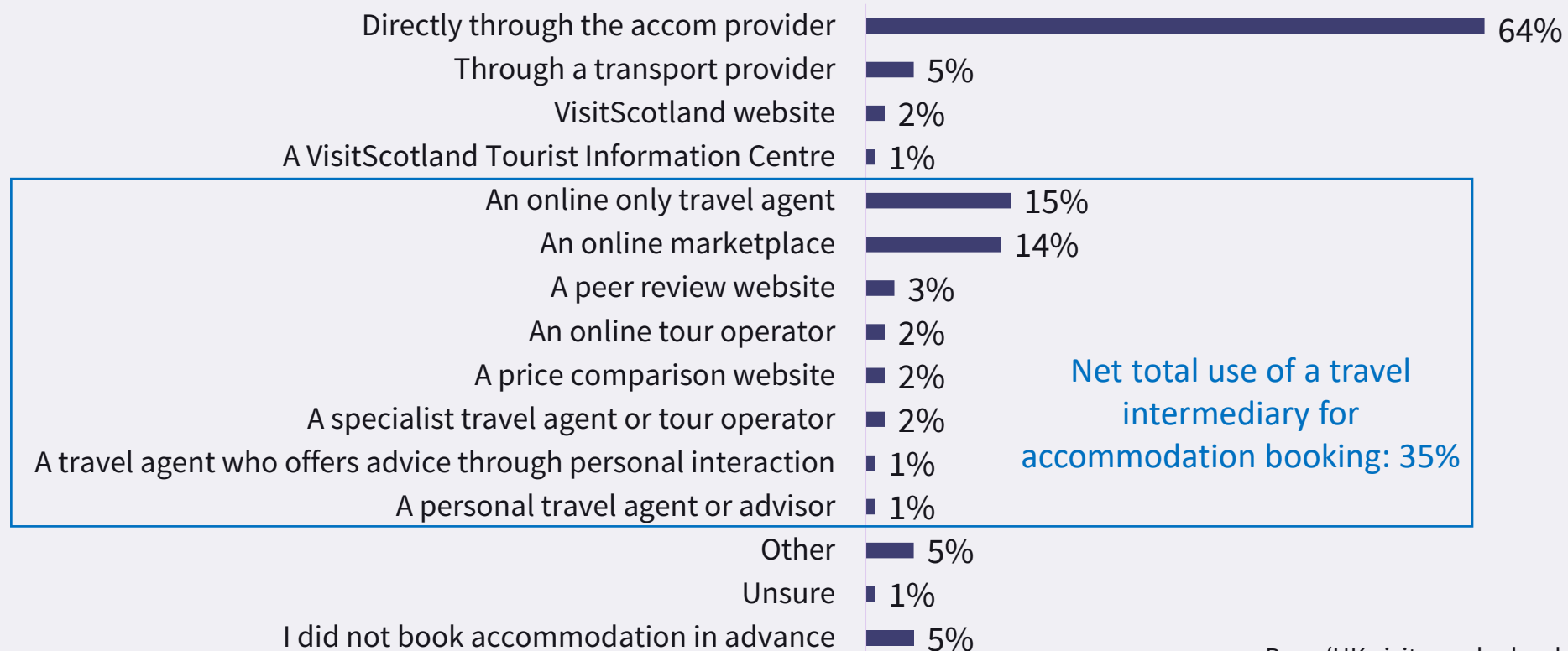
3.1 Methods used to book accommodation: Market comparison



3.2 Methods used to book accommodation: UK visitors

Direct booking with the accommodation provider was mostly mentioned (64%); online travel agencies and online marketplaces were the most cited travel intermediaries by UK visitors. In total, 1 in 3 used a type of intermediary for accommodation booking.

VisitScotland's resources seemed to be more popular in the holiday research stage and less so at the actual booking stage.



Base (UK visitors who booked some of trip in advance): 1,394

3.4 Methods used to book accommodation: significant highlights for UK visitors

By region of residence: Scotland residents were more likely to mention booking directly with the accommodation provider (69%) than those from the rest of the UK (62%). Rest of UK visitors were more likely to book through an online travel agent (17% vs Scotland residents 10%) or an online marketplace (15% vs Scotland residents 11%).

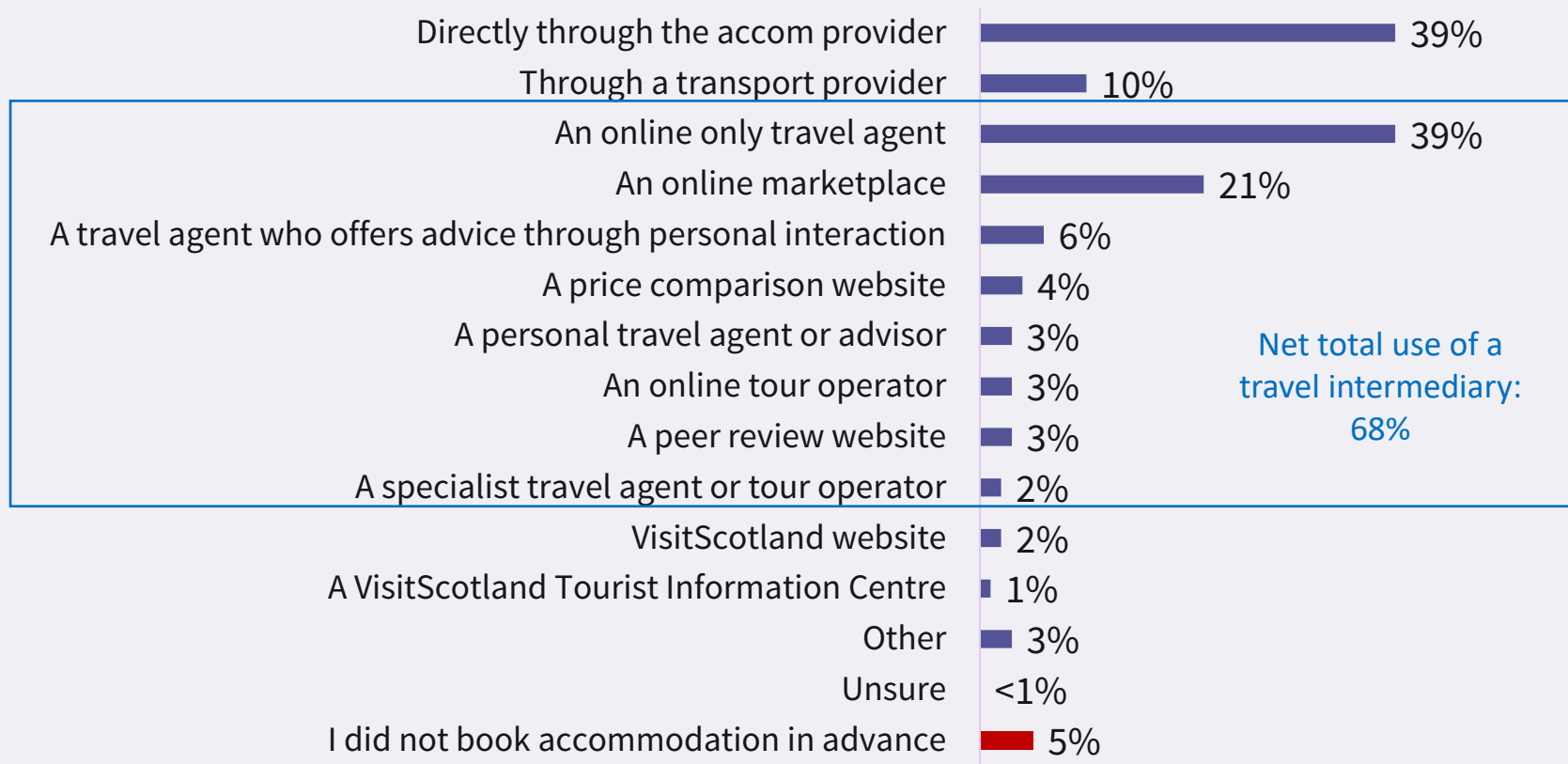
By previous travel experience in Scotland: Repeat visitors were more likely to book directly with the accommodation provider (65%) than first time visitors (52%). Higher proportions of first timers mentioned online travel agents (28% first timers vs 14% repeat) and online marketplaces (23% first timers vs 13% repeat).

By life stage: Pre-nesters (27%) were more likely to use an online marketplace than other life stage groups. Families (66%) and couples (69%) were more likely to book directly with the provider than solo travelers (45%) and friendship groups (57%).



3.3 Methods used to book accommodation: European visitors

With regards to accommodation booking, travel intermediaries play a significant role with 68% citing their use. Direct booking with the accommodation provider is also a popular way amongst European visitors.



3.4 Methods used to book accommodation: significant highlights for European visitors

By region of residence: Visitors from the Netherlands were more likely than visitors from other countries to book via a transport provider (20%).

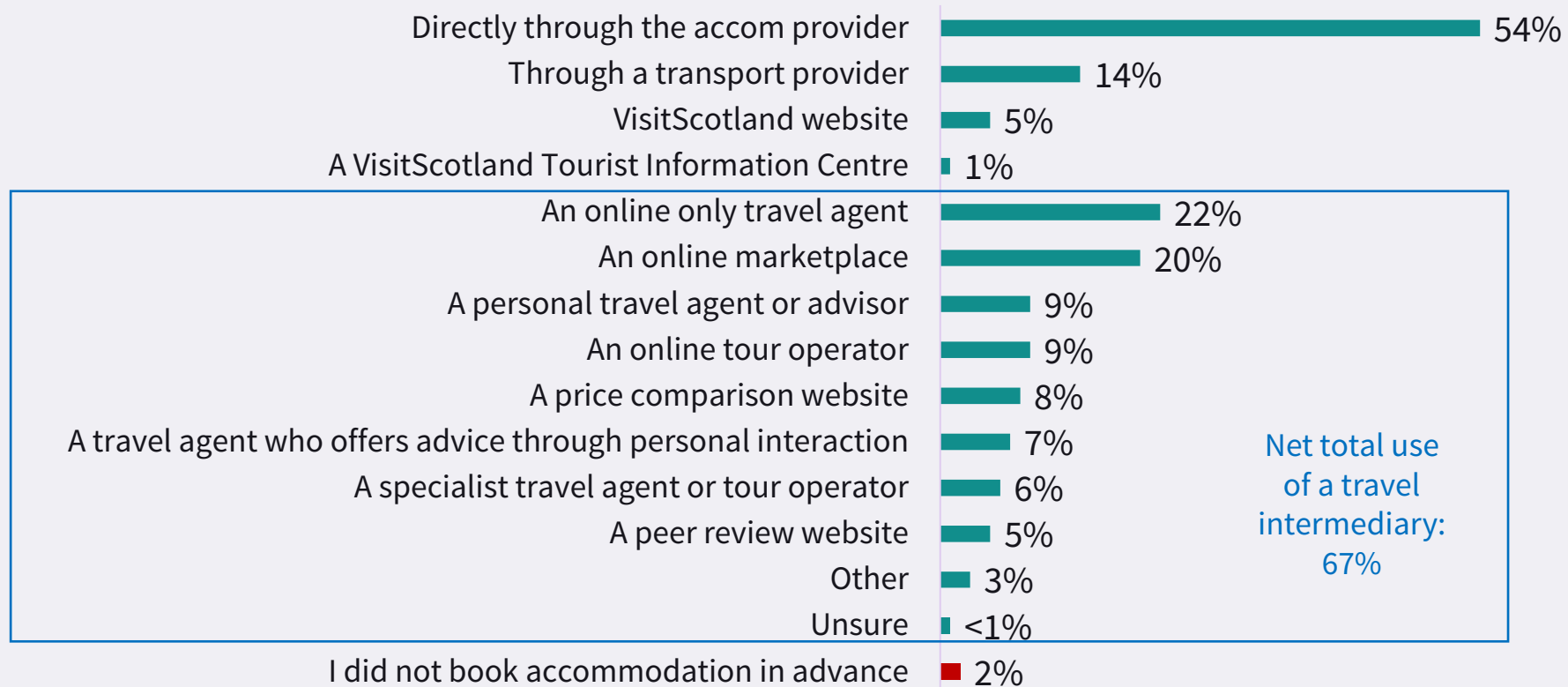
By previous travel experience in Scotland: Repeat visitors were more likely to book directly with the accommodation provider (45%) than first time visitors (34%).

By life stage: Pre-nesters were more likely to book through an online travel agent (51%) than other life stage groups.



3.5 Methods used to book accommodation: Long haul visitors

More than half of long-haul visitors booked their accommodation directly with the provider (54%).
67% of long-haul visitors used some type of intermediary when booking their accommodation.



3.6 Methods used to book accommodation: significant highlights for Long haul visitors

By region of residence: Visitors from Australasia were more likely to use an online travel agent (35%) or an online marketplace (31%) than visitors from the USA (17% for each).

By previous travel experience in Scotland: There were no significant differences between first time and repeat visitors within the long-haul markets sample.

By life stage: Pre-nesters (30%) and families (37%) were more likely to use an online marketplace than older independents (20%) and retirement aged visitors (15%).



4.0 VISITOR SATISFACTION WITH ACCOMMODATION

4. Visitor Satisfaction

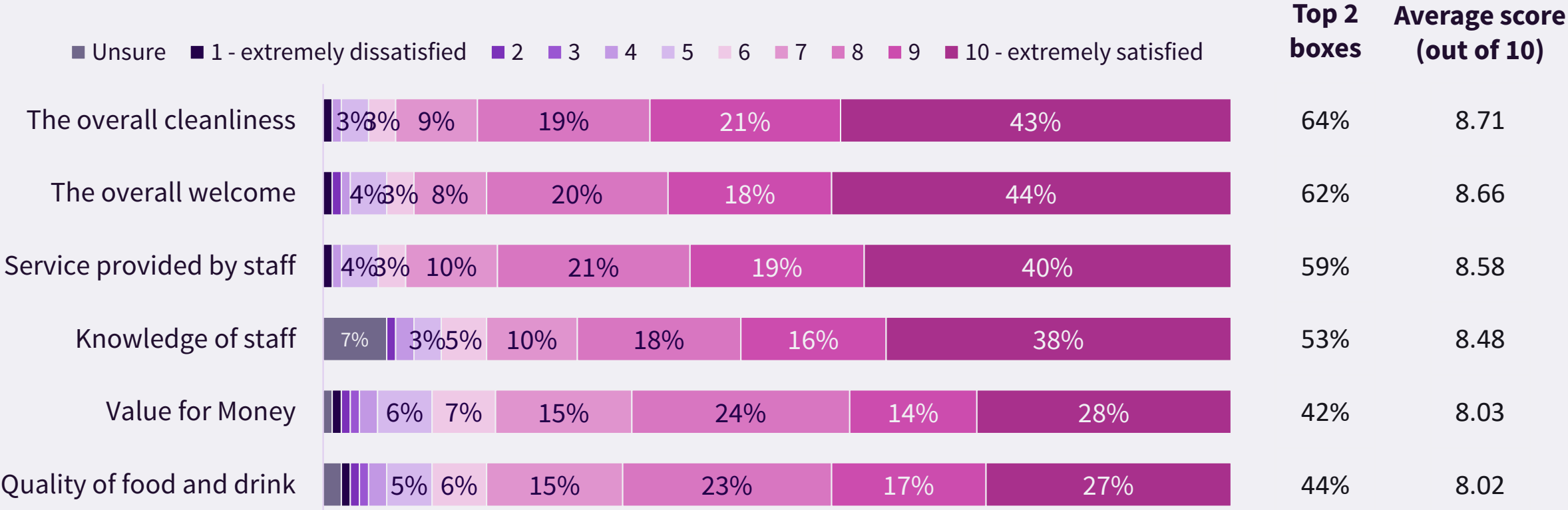
In this section, we wanted to understand how satisfied visitors were with their accommodation in Scotland:

- How satisfied were visitors with the different aspects of their accommodation, such as cleanliness, service and value for money?
- What differences were there in accommodation satisfaction between visitor markets?



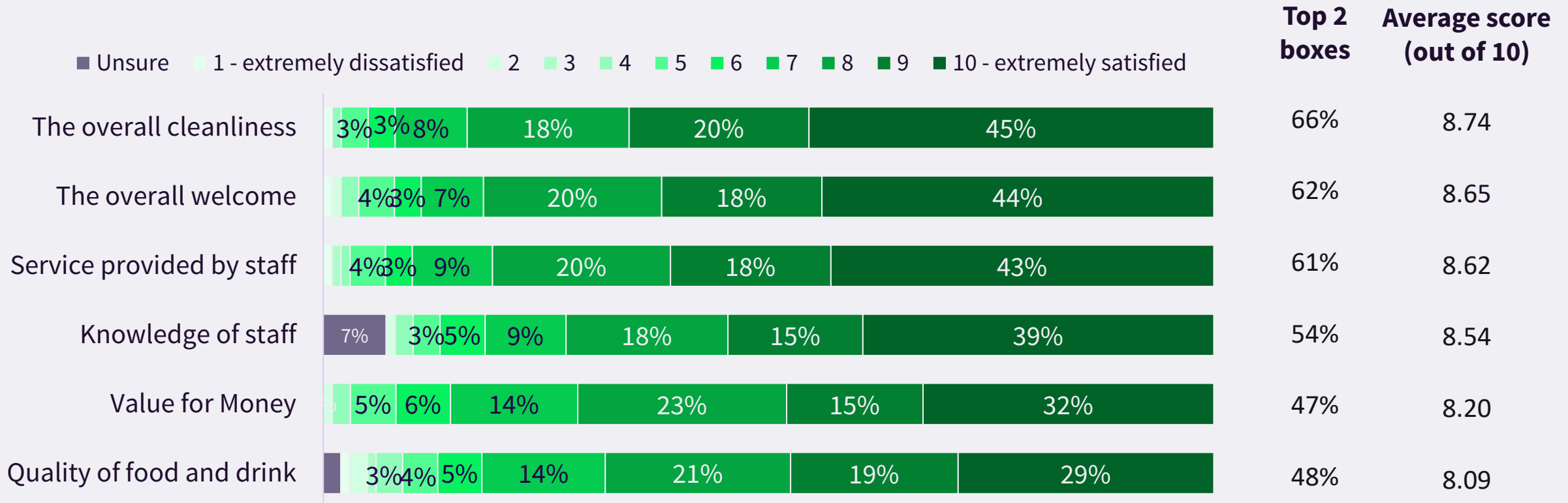
4.1 Satisfaction with accommodation: All visitors

Visitors who stayed in paid accommodation were generally satisfied with all aspects, but scored cleanliness, the welcome they received, and the service provided by staff particularly highly.



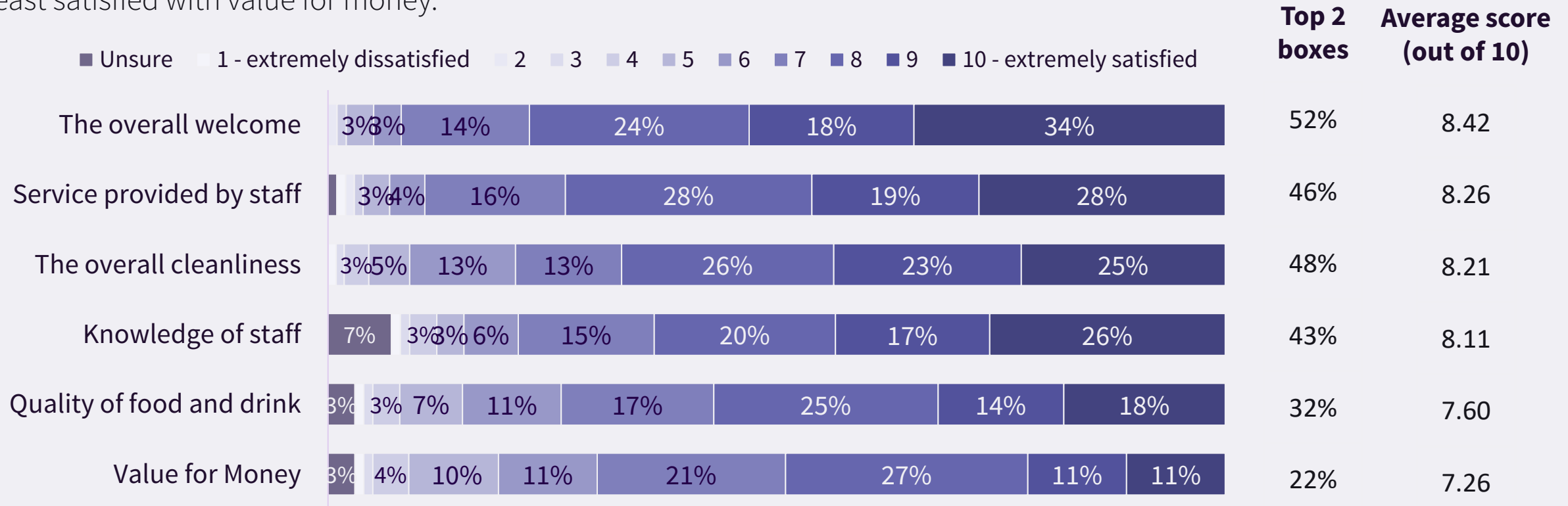
4.2 Satisfaction with accommodation: UK visitors

Visitors from the UK expressed satisfaction with all aspects of their accommodation, but provided the highest scores for cleanliness, the welcome they received, and the service provided by staff. The quality of food and drink and value for money attracted lower scores from these visitors.



4.3 Satisfaction with accommodation: European visitors

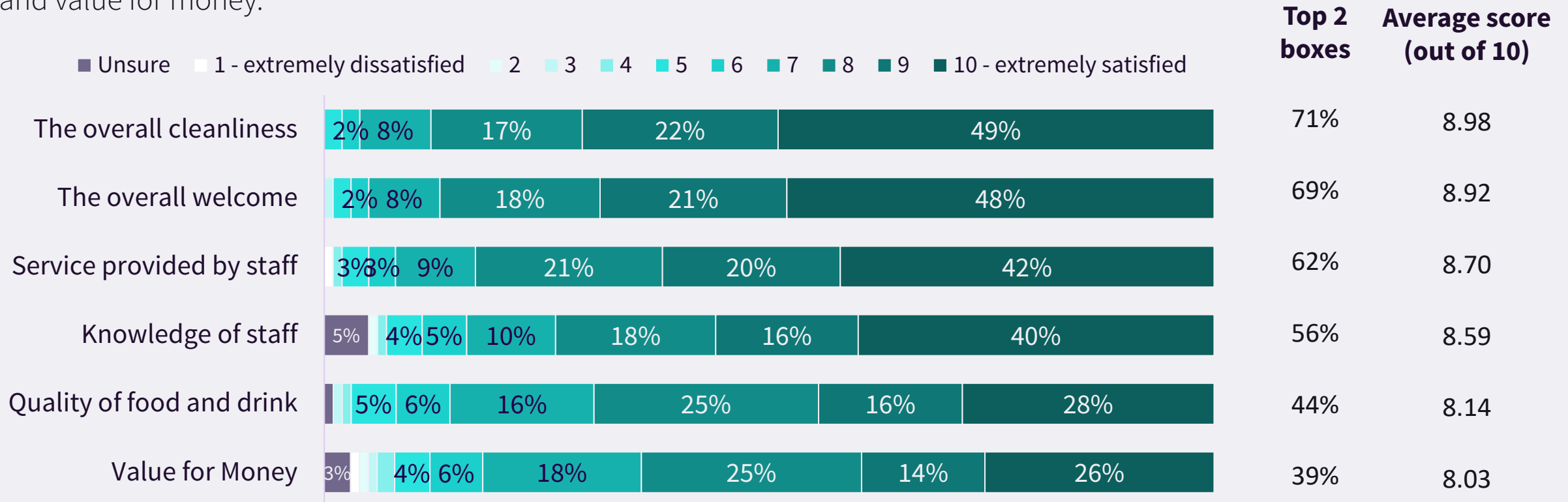
Although most were satisfied, visitors from Europe who stayed in paid accommodation tended to provide lower scores than those from the UK or long-haul markets. They were most satisfied with the welcome they received and least satisfied with value for money.



Visitors from the Netherlands tended to provide lower than average scores for the service provided (35% top 2 boxes), the welcome (37%) and cleanliness (34%).

4.4 Satisfaction with accommodation: Long haul visitors

Long haul visitors who stayed in paid accommodation tended to be very satisfied, particularly with cleanliness, the welcome they received, and the service provided by staff. Lower scores were provided for the quality of food and drink and value for money.



Visitors from the USA were the most satisfied with value (46% top 2 boxes, vs. 25% Canada; 29% Australasia), service (68%, vs. 54% Canada; 47% Australasia), the welcome (74% vs. 60% Canada; 61% Australasia) and cleanliness (76% vs. 62% Canada; 61% Australasia)

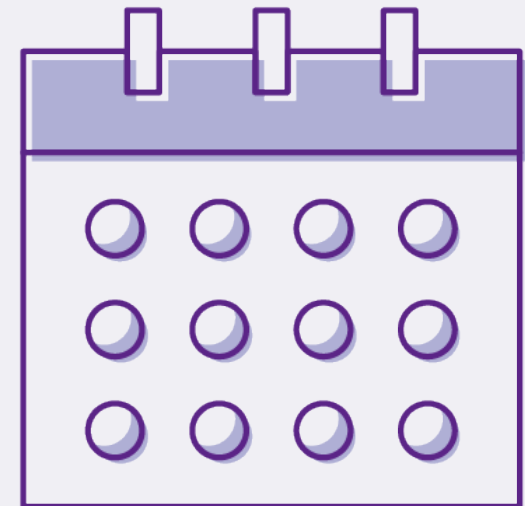


Base (Q42 – all Long haul who used stayed in paid for accommodation, excl. not applicable): 615 - 766

Q35 (Stage 2): Thinking about the accommodation you stayed in during your holiday or short break in Scotland, overall, how satisfied were you with the following?

5. 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 living at home
 - Older independents: respondents aged 35 to 64 with no children
 - Retirement age: respondents aged 65 and over





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