

SCOTLAND VISITOR SURVEY 2023

ATTRACTION DEEP DIVES

1. Castles or forts
2. Whisky distilleries
3. Museums and art galleries
4. Country parks and gardens
5. Cathedral, church, abbey
6. UNESCO sites
7. Historic house, palace, stately homes
8. Nature reserves
9. Working farms or crofts
10. Breweries and gin distilleries

Castles or Forts (1)

59% of all visitors to Scotland visited a castle or fort on their trip in 2023

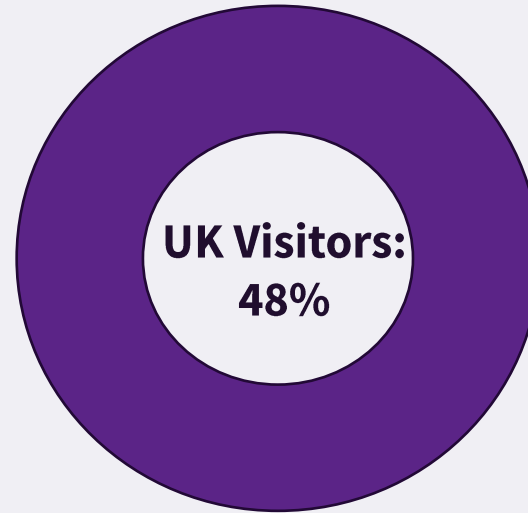
- Older independents were most likely to visit a castle or a fort (63%) followed closely by pre-nesters (62%).
- Overseas visitors (84%) were much more likely to visit than domestic visitors (48%).
- Long-haul visitors were most likely of all markets to visit (88%).
- Visiting a castle or fort was popular across the board for all party sizes (solo travellers to those travelling in a group of 10+). This was the most popular attraction for those visiting in a group of 10+ (69%).
- Castles and forts were incredibly popular with visitors on all different types of trip. Those on a 'trip of a lifetime' were most likely to visit (85%), followed by those on a special holiday or short break (71%).
- There was a noticeable difference between first time visitors (82%) and repeat visitors (51%).
- Those who toured around Scotland, staying in two or more places, were far more likely to visit a castle or fort (74%) compared to those who stayed in one coastal location (37%).





Castles or Forts (2)

59% of all visitors to Scotland visited a castle or fort on their trip in 2023



Rest of UK: 55%



Scotland: 28%



USA: 88%



Canada: 87%



Australasia: 90%



Castles or Forts (3)

59% of all visitors to Scotland visited a castle or fort on their trip in 2023



Germany: 80%



France: 86%



Netherlands: 77%



Spain/Italy: 91%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

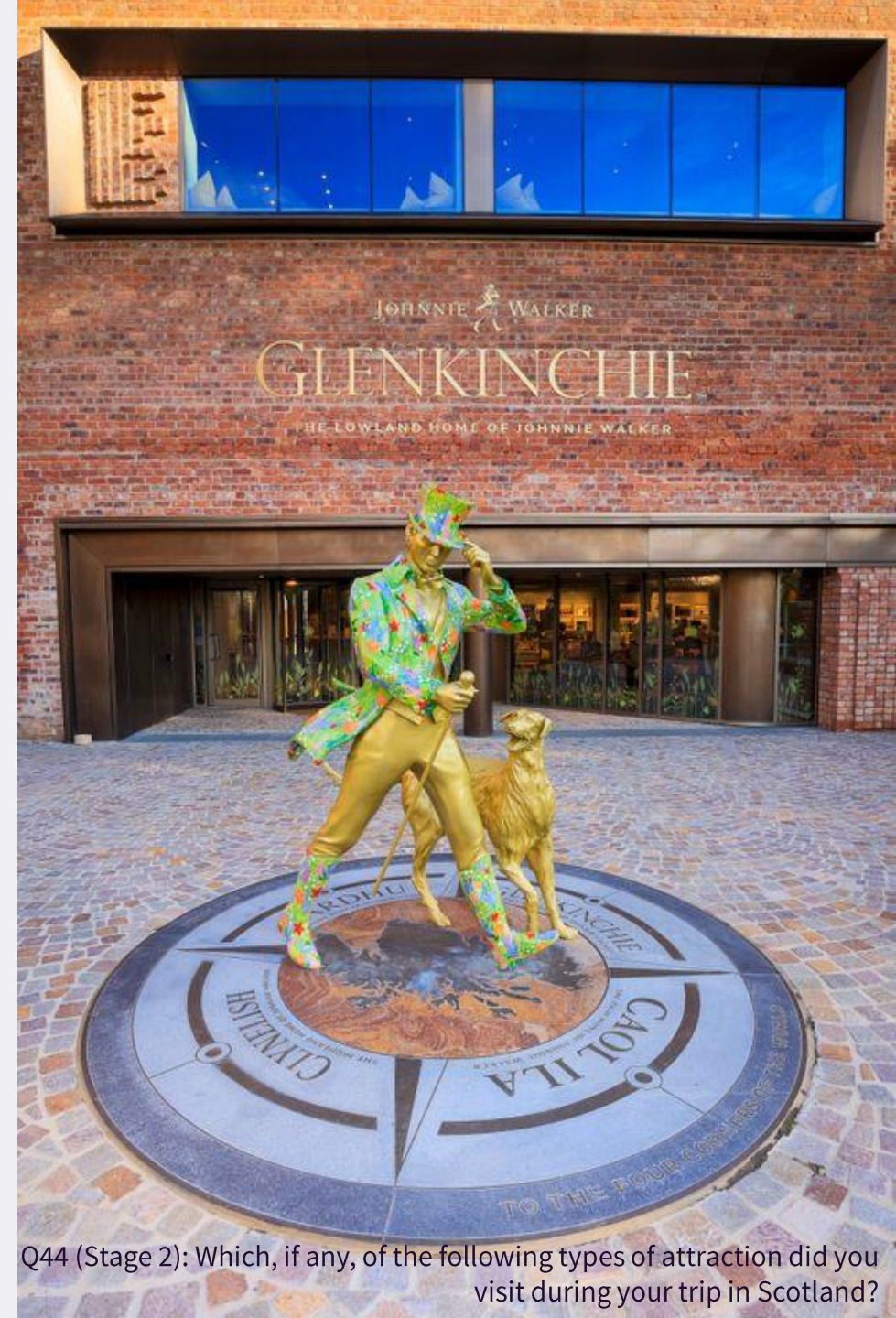
Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87
Spain/Italy n=79

Whisky Distilleries (1)

Deep
Dive

21% of all visitors to Scotland visited a whisky distillery on their trip in 2023

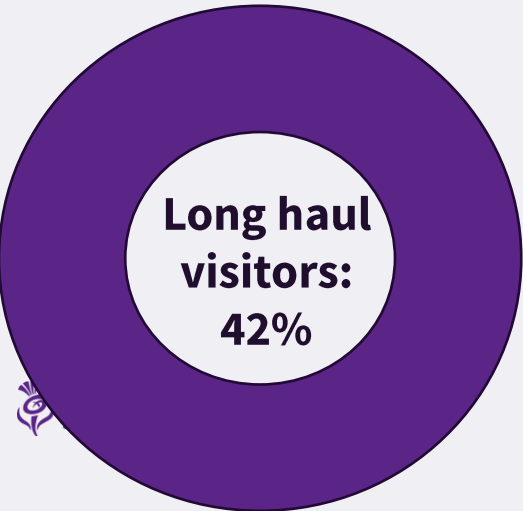
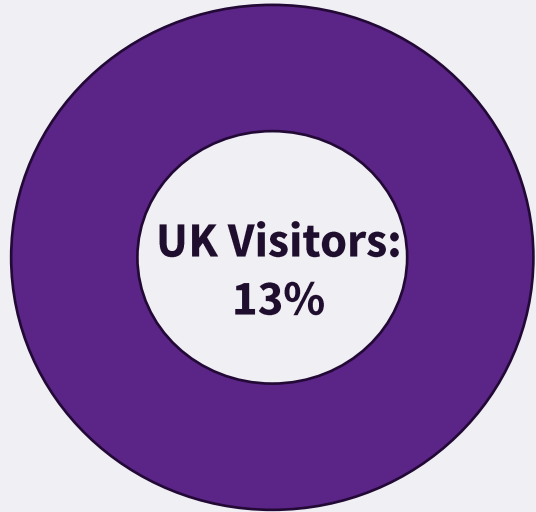
- Life stage: Pre-nesters were most likely to visit a whisky distillery (25%) compared to families who were less likely (12%).
- Overseas visitors (39%) were more likely to visit than domestic visitors (13%).
- Long-haul visitors were most likely of all markets to visit (42%).
- 38% of visitors to a whisky distillery were in groups with 10 or more people.
- Those on a 'trip of a lifetime' were more likely to visit (40%).
- There was also a noticeable difference between first time visitors (37%) and repeat visitors (16%).



Whisky Distilleries (2)

Deep Dive

21% of all visitors to Scotland visited a whisky distillery on their trip in 2023



Rest of UK: 15%



Scotland Residents: 7%



USA: 44%



Canada: 39%



Australasia: 37%



Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

Whisky Distilleries (3)

21% of all visitors to Scotland visited a whisky distillery on their trip in 2023

Deep Dive



Germany: 51%



France: 37%



Netherlands: 37%



Spain/Italy: 32%





Museums and Art Galleries (1)

Deep Dive

50% of all visitors to Scotland visited a museum or art gallery on their trip in 2023



Rest of UK: 47%



Scotland Residents: 34%



USA: 63%



Canada: 77%



Australasia: 69%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?



Museums and Art Galleries (2)

Deep Dive

50% of all visitors to Scotland visited a museum or art gallery on their trip in 2023



Germany: 51%



France: 70%



Netherlands: 61%



Spain/Italy: 61%

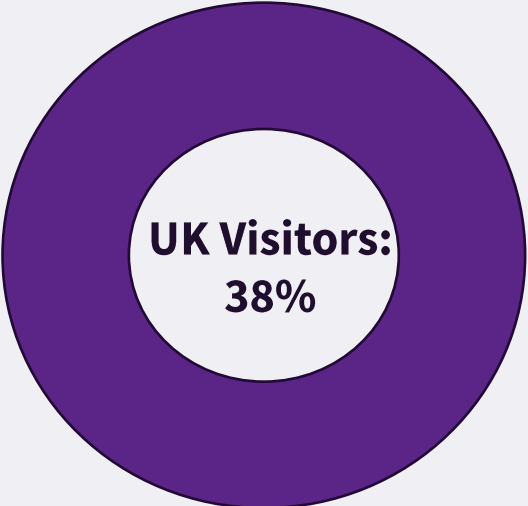
Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland

Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

Country Parks and Gardens (1)

42% of all visitors to Scotland visited a country park or garden on their trip in 2023

Deep Dive



Rest of UK: 42%



Scotland Residents: 28%



USA: 51%



Canada: 40%



Australasia: 58%



Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

Country Parks and Gardens (2)

42% of all visitors to Scotland visited a country park or garden on their trip in 2023

Deep Dive



Germany: 55%



France: 71%



Netherlands: 44%



Spain/Italy: 58%





Cathedral, Church, Abbey, Other Place of Worship (1)

Deep Dive

45% of all visitors to Scotland visited a cathedral, church, abbey or other place of worship on their trip in 2023



Rest of UK: 38%



Scotland Residents: 18%



USA: 76%



Canada: 76%



Australasia: 77%



Cathedral, Church, Abbey, Other Place of Worship (2)

Deep Dive

45% of all visitors to Scotland visited a cathedral, church, abbey or other place of worship on their trip in 2023



Germany: 73%



France: 77%



Netherlands: 66%



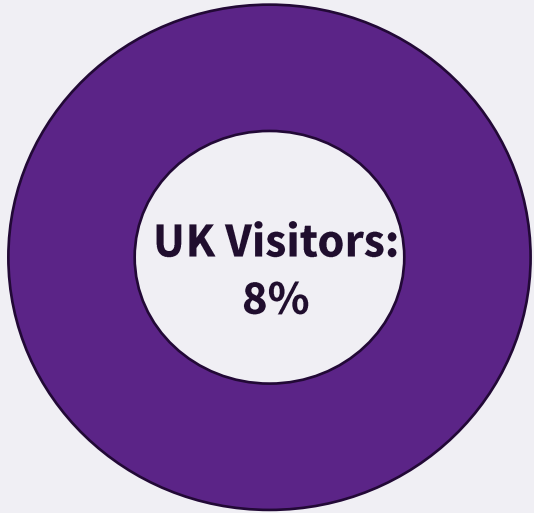
Spain/Italy: 85%

Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

A UNESCO Site (1)

13% of all visitors to Scotland visited a UNESCO site on their trip in 2023

Deep Dive



Rest of UK: 10%



Scotland Residents: 3%



USA: 27%



Canada: 25%



Australasia: 31%



Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

A UNESCO Site (2)

Deep Dive

13% of all visitors to Scotland visited a UNESCO site on their trip in 2023



Germany: 23%



France: 11%



Netherlands: 18%



Spain/Italy: 19%

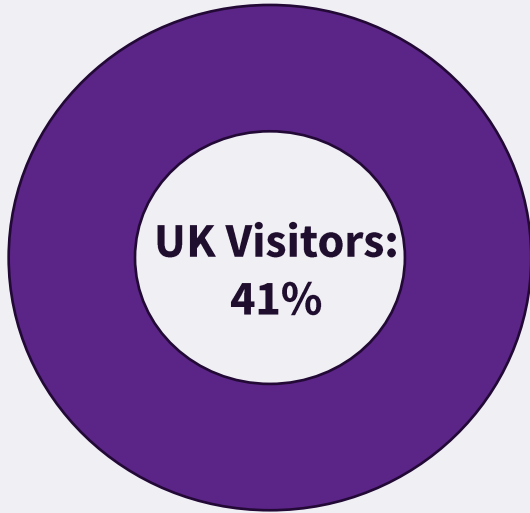




A Historic House, Palace, Stately Home (1)

Deep Dive

49% of all visitors to Scotland visited a historic house, palace or stately home on their trip in 2023



Rest of UK: 46%



Scotland Residents: 28%



USA: 73%



Canada: 63%



Australasia: 75%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?



A Historic House, Palace, Stately Home (2)

49% of all visitors to Scotland visited a historic house, palace or stately home on their trip in 2023

Deep Dive



Germany: 72%



France: 58%



Netherlands: 55%



Spain/Italy: 66%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

A Nature Reserve (1)

32% of all visitors to Scotland visited a nature reserve on their trip in 2023

Deep Dive



Rest of UK: 30%



Scotland Residents: 22%



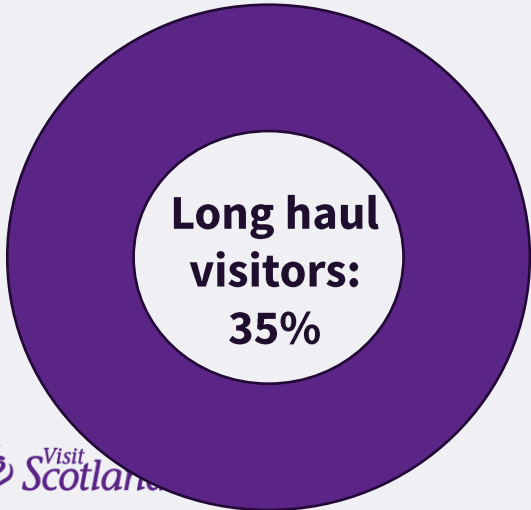
USA: 32%



Canada: 31%



Australasia: 47%



(Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

A Nature Reserve (2)

Deep Dive

32% of all visitors to Scotland visited a nature reserve on their trip in 2023



Germany: 66%



France: 54%



Netherlands: 66%



Spain/Italy: 52%

European visitors were more likely than any other market to visit a nature reserve



Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

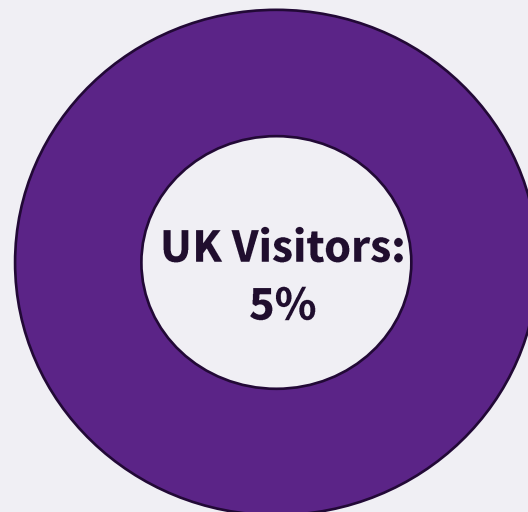
Long haul visitors were more likely than any other market to visit a working farm or croft



A Working Farm or Croft (1)

Deep Dive

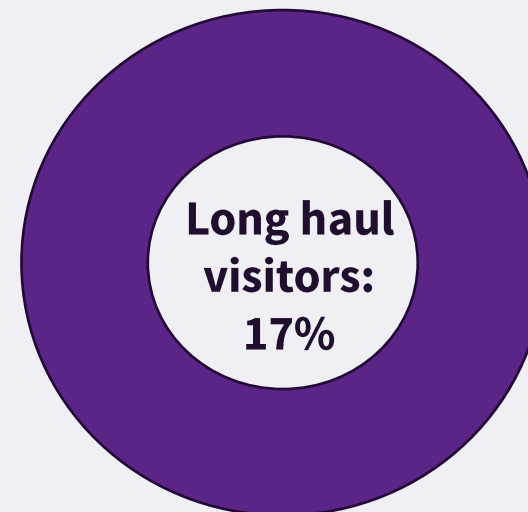
7% of all visitors to Scotland visited a working farm or croft on their trip in 2023



Rest of UK: 5%



Scotland Residents: 5%



USA: 21%



Canada: 9%



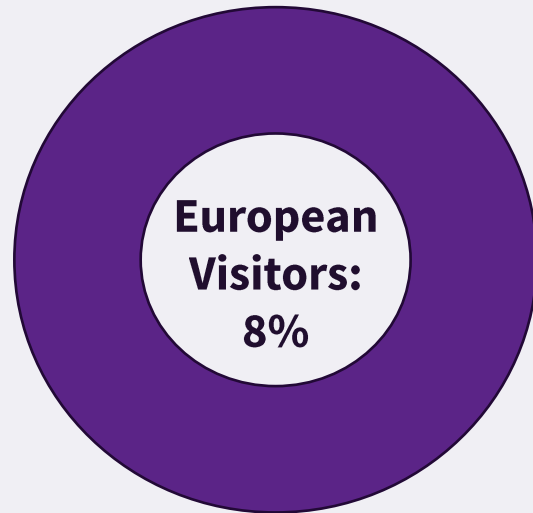
Australasia: 12%



A Working Farm or Croft (2)

Deep Dive

7% of all visitors to Scotland visited a working farm or croft on their trip in 2023



Germany: 7%



France: 11%



Netherlands: 14%



Spain/Italy: 10%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

Visited a brewery (1)

Deep Dive

6% of all visitors visited a brewery on their trip in 2023



Rest of UK: 5%



Scotland
Residents: 4%



USA: 17%



Canada: 12%



Australasia: 11%



Visited a brewery (2)

6% of all visitors visited a brewery on their trip in 2023

Deep Dive



Germany: 3%



France: 12%



Netherlands: 6%



Spain/Italy: 6%



Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?



Visited a gin distillery (1)

5% of all visitors visited a gin distillery on their trip in 2023

Deep Dive



Rest of UK: 4%



Scotland: 6%



USA: 8%



Canada: 5%



Australasia: 10%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?



Visited a gin distillery (2)

Deep Dive

5% of all visitors visited a gin distillery on their trip in 2023



Germany: 11%



France: 8%



Netherlands: 6%



Spain/Italy: 4%

Q44 (Stage 2): Which, if any, of the following types of attraction did you visit during your trip in Scotland?

Note: Data for individual European countries is unweighted. France n=91, Germany n=152, Netherlands n=87

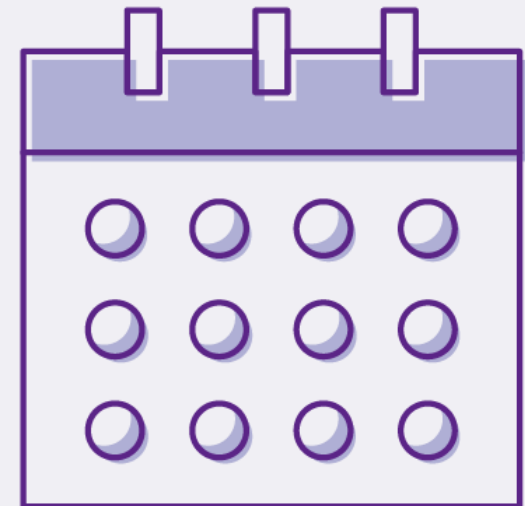
Scotland Visitor Survey 2023: Background

- 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



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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