SCOTLAND VISITOR SURVEY 2023

ATTRACTIONS, ACTIVITIES AND EVENTS (50 SLIDES)

1. What attractions did visitors visit on their trip in Scotland?
   How satisfied were they?

2. What activities did visitors take part in? How satisfied were they?

3. What events did visitors attend during their trip in Scotland?

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September 2024

progressive

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

Full details of the research objectives, methodology and technical appendix are available within the Background and Methodology report

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Background

1. Drivers and motivations for taking a holiday

2. Attractions

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Definitions

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1. Drivers and motivations for taking a holiday

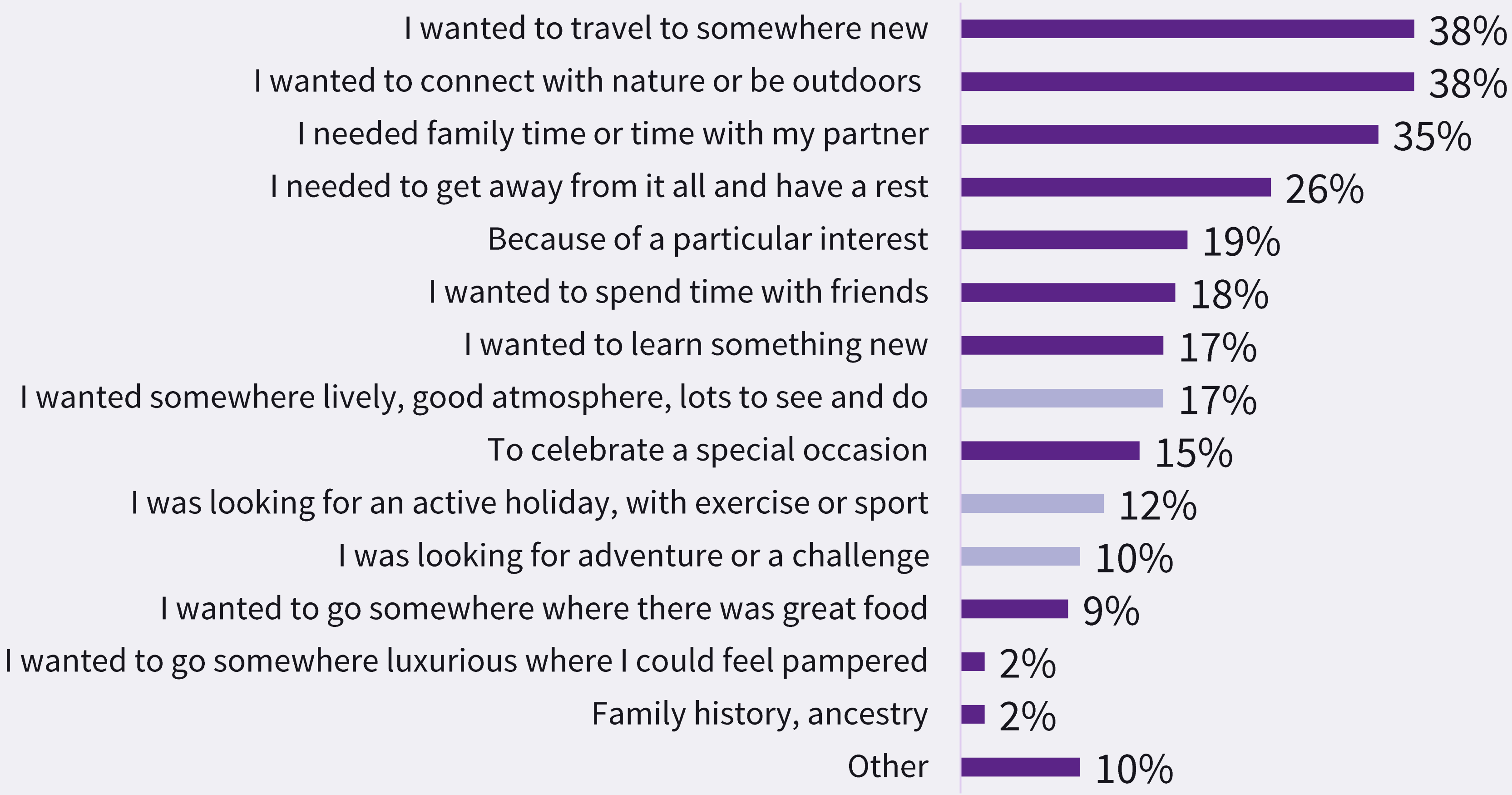
How far visitors engage with attractions, activities and events when here in Scotland may be influenced by a range of factors. Motivations in particular can influence how far a visitor will engage with activities and attractions when here.

Whilst there are core drivers and motivations for choosing Scotland which are strong across all our visitors, there are small nuances between markets.

1.1 Drivers for taking a holiday

In this section, we wanted to understand why people decided they needed a holiday in the first place.

There is no single driver to taking a holiday but a combination of many. Taking part in activities is a specific driver for some. 17% of respondents wanted somewhere with “lots to see and do”, while 12% of respondents were looking for “an active holiday, with exercise or sport”. 10% wanted an adventure or challenge.



Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland? Base (all): 3,011

1.2 Drivers for taking a holiday: markets

Looking at different markets, the initial drivers for a holiday can influence how far people desire an active holiday or rest and relaxation.

	UK	Europe	Long Haul
Get away from it all and have a rest	29%	24%	15%
Lively, good atmosphere, lots to see and do	11%	37%	27%
Active holiday	11%	15%	14%
Base	**1,531**	**625**	**795**

Respondents from the UK were more likely to state that they ‘needed to get away from it all and have a rest’.

European and long haul visitors were more likely to be driven by lots to see and do and to desire an active holiday.

Base (all): 3,011

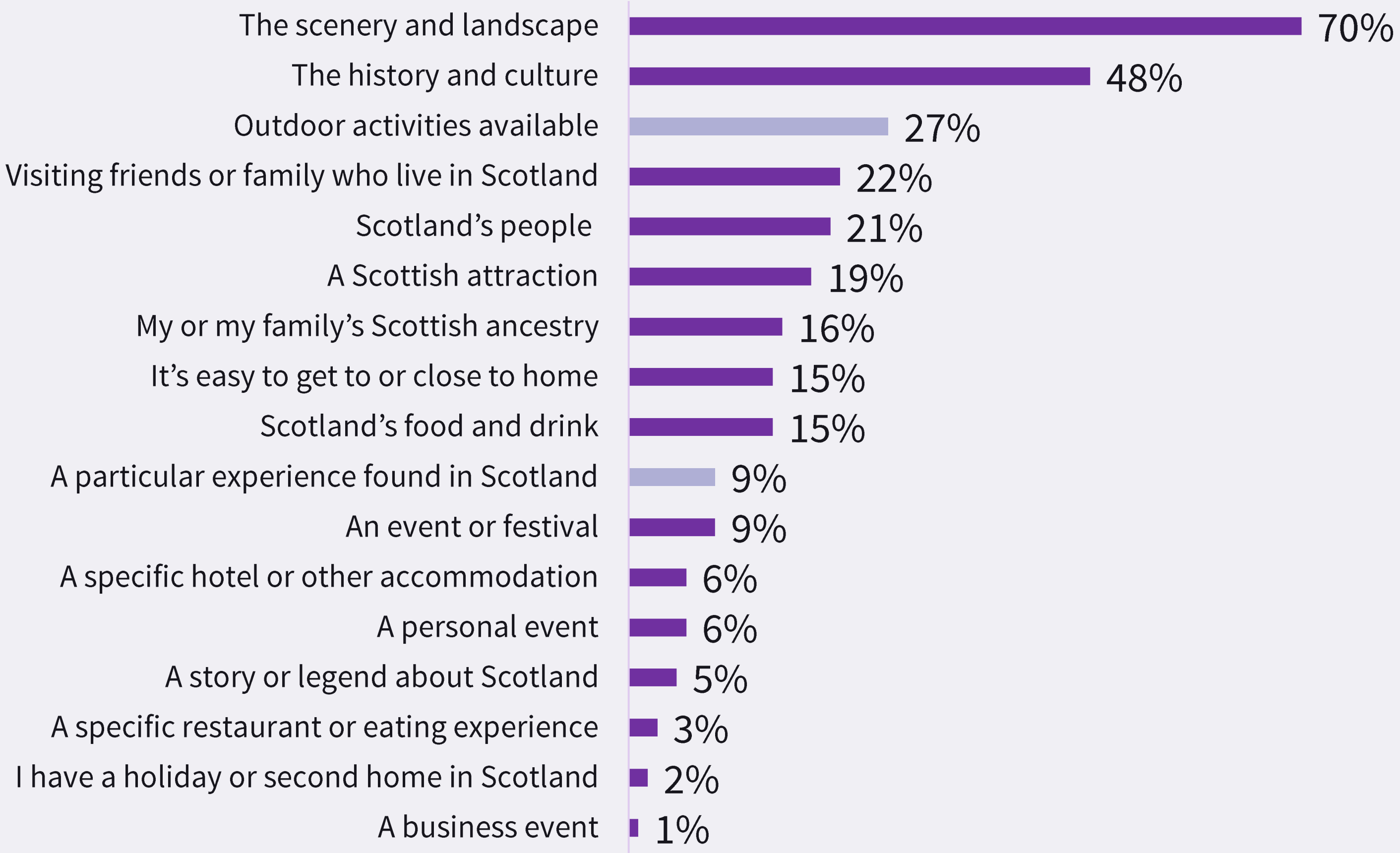
Q5 (stage 2): Thinking back to when you were considering the trip you have just taken in Scotland, what were the reasons that you decided to have a holiday or short break in the first place – before you decided on Scotland?

1.3 Reasons for choosing Scotland

27% of respondents stated that the availability of outdoor activities was a reason for choosing Scotland.

9% of respondents stated that a reason for visiting Scotland was due to a particular experience found in the country.

Visitors are highly motivated to visit Scotland by the nation's scenery and landscape. Closely linked to this core asset is the outdoor activities available.



Base (all): 3,011

Q6 (Stage 2): Thinking of your recent trip, which, if any, of these reasons initially attracted you to choose Scotland for your recent trip?

1.4 Reasons for choosing Scotland: markets

Scotland's scenery is a core motivator for all visitors to Scotland as are outdoor activities (as a way to explore and engage with our scenery), with little difference across markets.

Long haul visitors were more likely to select a "particular experience" than other visitor groups.

	UK	Europe	Long Haul
Outdoor activities	27%	28%	29%
Particular experience	9%	7%	12%
Base	**1,531**	**625**	**795**

Base (all): 3,011

Q6 (Stage 2): Thinking of your recent trip, which, if any, of these reasons initially attracted you to choose Scotland for your recent trip?

2. Attractions

2.1 Attractions: Key Insights

96% of all visitors holidaying in Scotland in 2023 visited at least one attraction during their trip. The most popular attractions were

- castles and forts (59%)
- museums and art galleries (50%)
- historic houses, palaces and stately homes (49%)
- cathedral, church or place of worship (45%)

Long-haul visitors were more likely to visit visitor/heritage centres, UNESCO sites, working farms and crofts, and breweries than other markets.

European visitors were more likely to visit scenic outdoor attractions such as archaeological sites, country parks, gardens and nature reserves.

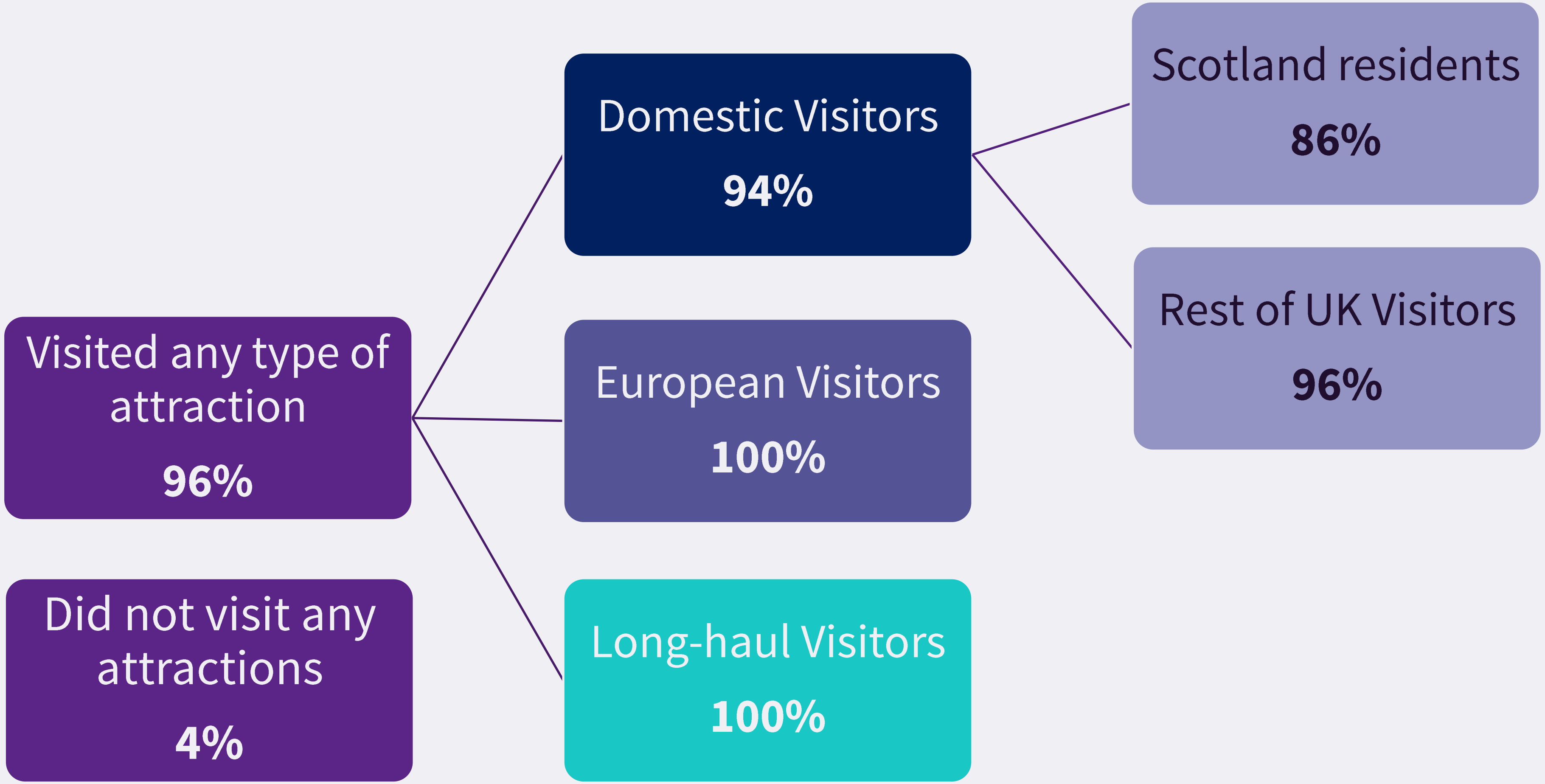
Attractions were rated highly across the board, with the knowledge and passion of staff and the overall quality of experience scoring particularly well.

Long-haul visitors rated the staff, quality of experience and value for money of attractions highest while European visitors were more likely to give lower scores.

Value for money scored slightly lower for all markets but this is in line with findings from VisitBritain's MIDAS study which found that this was a particular weakness for Britain, especially amongst international travellers.

2.2 Visiting Attractions

The majority of visitors visited at least one type of attraction during their trip in Scotland. Overseas visitors were more likely to visit an attraction, while Scotland residents were least likely.



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Base (all): 3,011

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

2.3 Attractions Visited: Top ten

Attractions visited are closely linked to the core motivations to holiday in Scotland, our scenery, history and culture.

59%
a castle or fort

50%
a museum or art gallery

49%
a historic house, palace or stately home

45%
a cathedral, church, abbey, place of worship

42%
a country park or garden

42%
a visitor or heritage centre

32%
a nature reserve

24%
an archaeological site

21%
a whisky distillery

13%
a UNESCO site

Base (all): 3,011

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

2.4 Attractions Visited: Market Summary

Interpretation note for table: numbers with a * denotes statistically significant difference

	Total sample	UK visitors	Europe visitors	Long haul visitors
A castle or fort	59%	48%	80%	88%
A museum or art gallery	50%	44%	60%	66%
A historic house, palace, stately home	49%	41%	60%	72%
A cathedral, church, abbey, place of worship	45%	33%	71%	76%
A country park or garden	42%	38%	52%	51%
A visitor or heritage centre	42%	40%	38%	54% *
A nature reserve	32%	28%	52% *	35%
An archaeological site	24%	18%	32% *	41% *
A whisky distillery	21%	13%	38%	42%
A UNESCO site	13%	8%	16% *	28% *
An aquarium, zoo, wildlife park, safari park	7%	7%	8%	6%
A working farm or croft	7%	5%	8%	17% *
A brewery	6%	5%	6%	15% *
A gin distillery	5%	4%	8%	8%
Another attraction	13%	14%	8%	12%
Did not visit any attractions	4%	6% *	0%	0%
Base	**3,011**	**1,531**	**625**	**795**

2.5 Attractions Visited: UK Visitors

94%

of UK visitors visited at least one type of attraction during their trip in Scotland in 2023.

Visitors from the UK were likely to visit historical sites such as castles, historic houses, palaces and stately homes. Over a third also reported visiting country parks and gardens during their trip.

Castle or fort	**48%**
Museum or art gallery	**44%**
Historic house, palace, stately home	**41%**
Visitor or heritage centre	**40%**
Country park or garden	**38%**

Base (all UK visitors): 1,531

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

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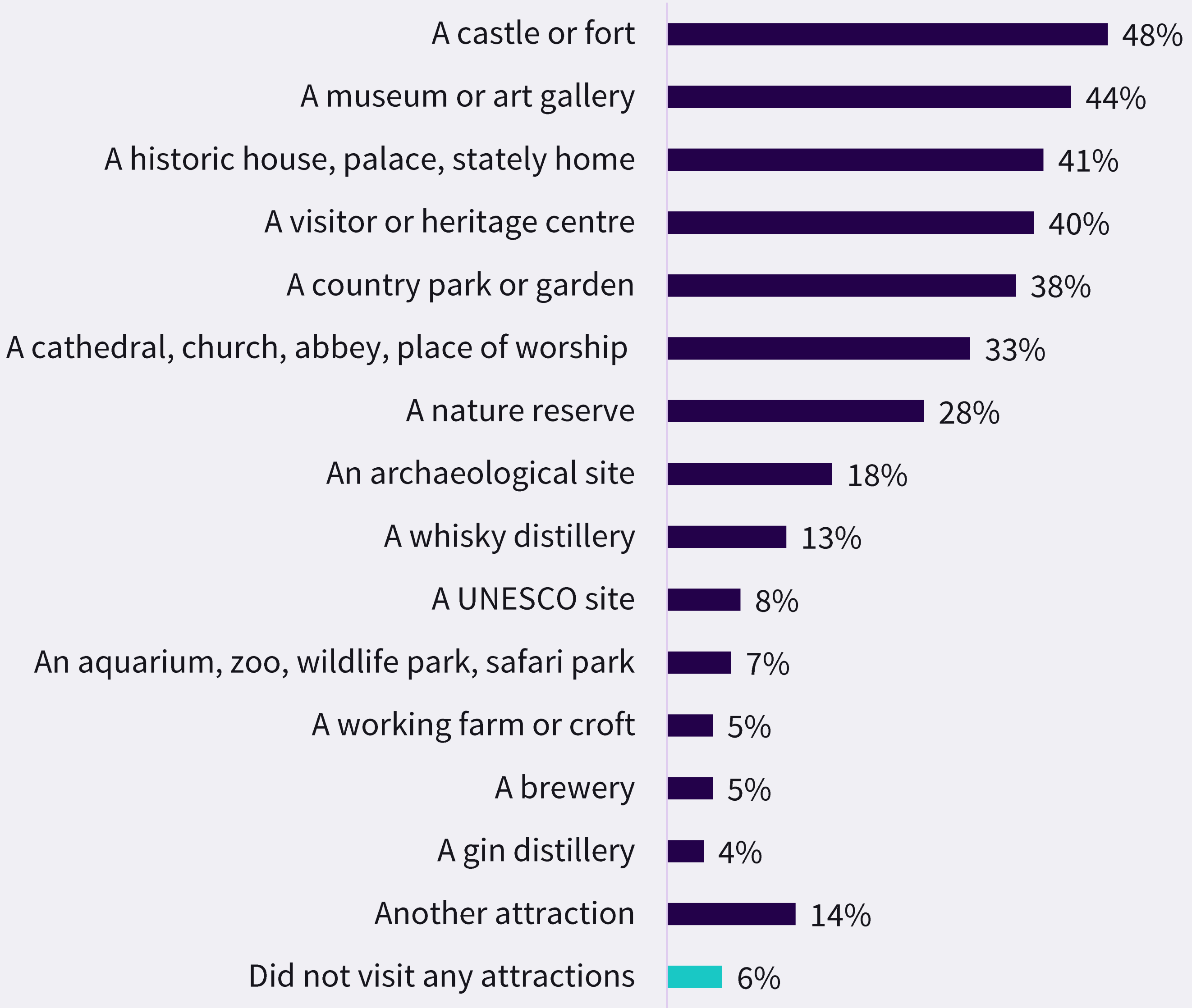
2.6 Attractions Visited: UK visitors

UK visitors were less likely to visit as many attractions compared to long haul and European visitors, especially those connected to Scotland's history and culture.

A number of factors may influence this including the high level of repeat visits amongst the domestic market (90%). Also the greater desire to 'get away from it all' as a motivation for the trip.

A challenge may remain on how to encourage domestic visitors to explore Scotland's history and culture in new ways.



Base (all UK visitors): 1,531

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

2.7 Attractions Visited: European Visitors

100%

of European visitors visited one type of attraction during their trip in Scotland in 2023.

European visitors were more likely than other markets to visit scenic outdoor attractions such as country parks, gardens, nature reserves, and archaeological sites.

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Castle or fort	**80%**
Cathedral, church, abbey, place of worship	**71%**
Historic house, palace, stately home	**60%**
Museum or art gallery	**60%**
Nature reserve	**52%**

Base (all European visitors): 625

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

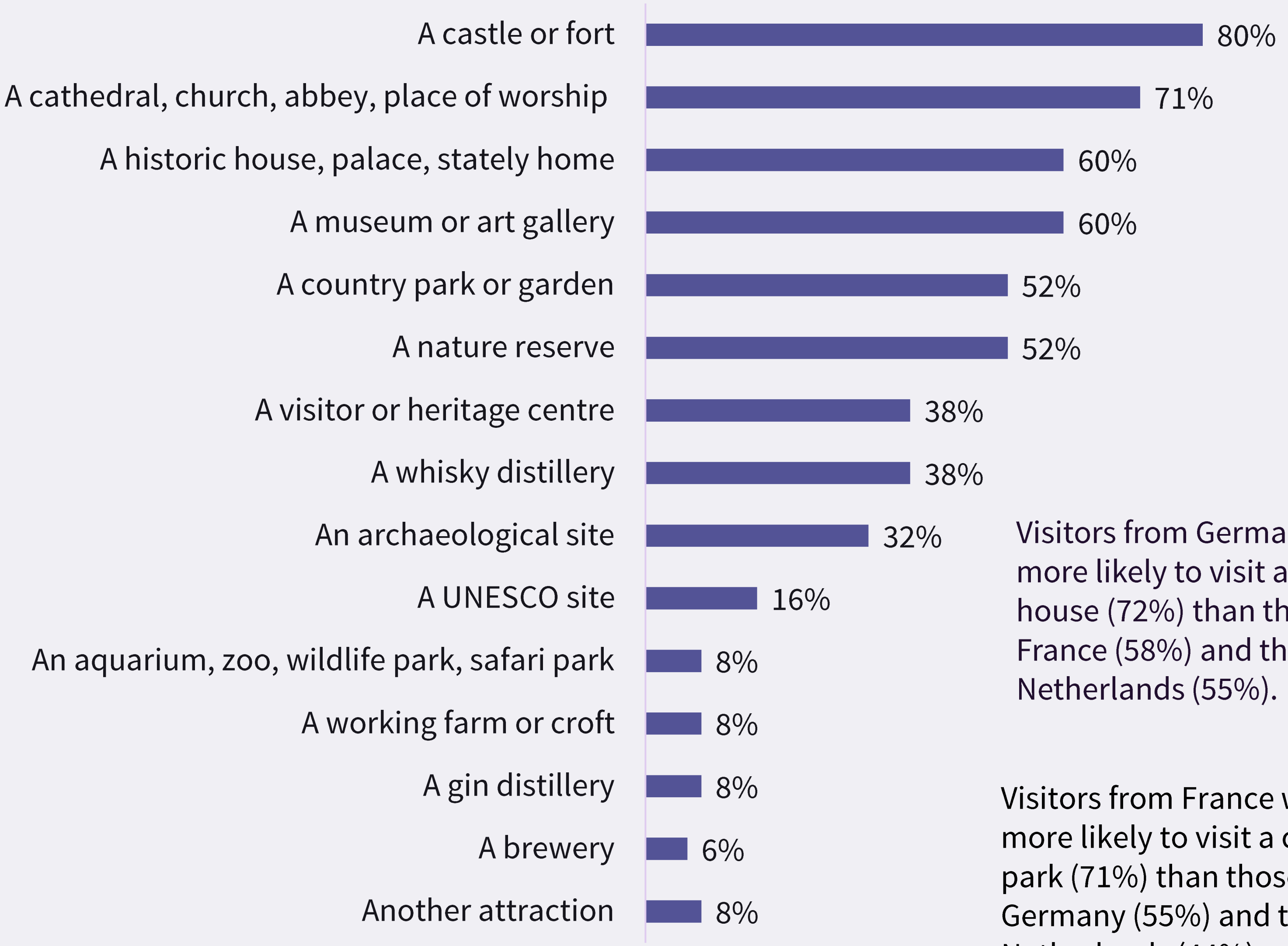
2.8 Attractions Visited: European visitors

Top 5:

- Castle or fort
- Cathedral, church, abbey
- Historic house/palace
- Museum or art gallery
- Country park or garden/nature reserve

Over index on:

- A nature reserve
- An archaeological site



Visitors from Germany were more likely to visit a historical house (72%) than those from France (58%) and the Netherlands (55%).

Visitors from France were more likely to visit a country park (71%) than those from Germany (55%) and the Netherlands (44%).

Base (all European visitors): 625

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

2.9 Attractions Visited: Long-Haul Visitors

100%

of long haul visitors visited an attraction during their trip in Scotland in 2023.

Long-haul visitors were most likely to state they were on a ‘trip of a lifetime’ as well as being more likely first time visitors (61%), which may explain why they visited so many attractions.

Castle or fort	**88%**
Cathedral, church, abbey, place of worship	**76%**
Historic house, palace, stately home	**72%**
Museum or art gallery	**66%**
Visitor or heritage centre	**54%**

Base (all long haul visitors): 795

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

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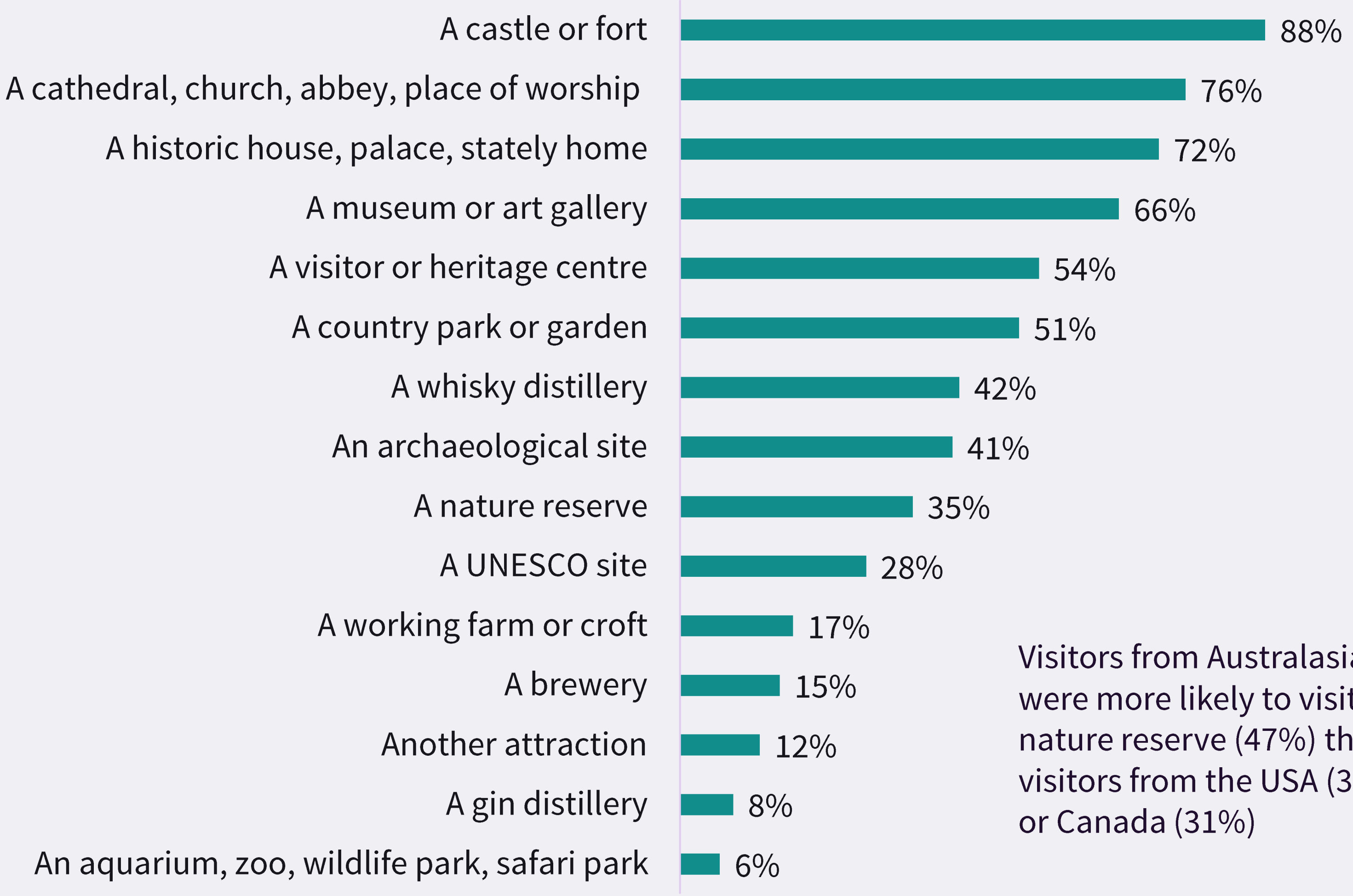
2.10 Attractions Visited: Long haul visitors

Top 5:

- Castle or fort
- Cathedral, church, abbey
- Historic house/palace
- Museum or art gallery
- Visitor or heritage centre

Over index on:

- Visitor or heritage centres
- An archaeological site
- UNESCO site
- Working farm or croft
- Brewery



Visitors from Australasia were more likely to visit a nature reserve (47%) than visitors from the USA (32%) or Canada (31%)

Base (all long haul visitors): 795

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

2.11 Attractions Visited by Life Stage

Pre-nesters

Top attractions:

- Castle or fort 62%
- Museum or art gallery 60%
- Cathedral, church, place or worship 54%
- Historic house, palace, stately home 48%
- Country park, garden 45%

Over index on:

- Castle or fort 62%
- Museum or art gallery 60%
- Cathedral, church, place or worship 54%
- Country park, garden 45%
- Nature reserve 43%
- Whisky distillery 25%

Families

Top attractions:

- Castle or fort 57%
- Museum or art gallery 50%
- Country park, garden 48%
- Visitor or heritage centre 43%
- Historic house, palace, stately home 41%

Over index on:

- Country park, garden 48%
- Nature reserve 40%
- An aquarium, zoo, wildlife park 19%

Older independents

Top attractions:

- Castle or fort 63%
- Cathedral, church, place or worship 48%
- Historic house, palace, stately home 48%
- Museum or art gallery 47%
- Country park, garden 42%
- Visitor or heritage centre 42%

Over index on:

- Castle or fort 63%
- Cathedral, church, place or worship 48%
- Whisky distillery 23%

Retirement age

Top attractions:

- Historic house, palace, stately home 53%
- Castle or fort 52%
- Museum or art gallery 51%
- Visitor or heritage centre 43%
- Cathedral, church, place or worship 42%

Over index on:

- Historic house, palace, stately home 53%

Base (all): Pre-nesters 338; Families 327; Older independents 1,406; Retirement age 901

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

2.12 Satisfaction with Attractions

64%

of visitors were very satisfied with the knowledge and passion of staff at attractions (9 or 10 out of 10).

This rises to 69% for long haul visitors.

Both the knowledge and passion of staff and the overall quality of experience at attractions scored very highly, with over half of respondents ranking them either a nine or ten out of ten.

Value for money scored lower but this is similar to other areas of the visitor experience.

Long-haul visitors were most likely to score highly across all categories, while European visitors were more likely to give lower scores.

	Mean score	**9 or 10 out of 10**
Knowledge and passion of staff at attractions	8.85	64%
Quality of experience at attractions	8.70	57%
Value for money of paid for attractions	8.32	47%

2.13 Knowledge and passion of staff at attractions

64%

of all visitors rated the knowledge and passion of staff at attractions either a 9 or 10 out of 10

UK visitors:

65%

European visitors:

55%

Long-haul visitors:

69%

Q50 (Stage 2): Thinking about the activities you did and attractions you visited, overall how satisfied or dissatisfied were you with the following?

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2.14 Quality of experience at attractions

57%

of all visitors rated the quality of experience at attractions either a 9 or 10 out of 10

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UK visitors:

58%

European visitors:

44%

Long-haul visitors:

64%

Q50 (Stage 2): Thinking about the activities you did and attractions you visited, overall how satisfied or dissatisfied were you with the following?

2.15 Value for money at attractions

47%

of all visitors rated the value for money at attractions either a 9 or 10 out of 10

UK visitors:

48%

European visitors:

34%

Long-haul visitors:

52%

Q50 (Stage 2): Thinking about the activities you did and attractions you visited, overall how satisfied or dissatisfied were you with the following?

3. Activities

Interpretation note:
Please note that the sample comprises **leisure overnight visitors only.** The results do not include the experience of day visitors who may be an important market for some activity providers.

In addition, whilst the survey involved short face to face interviews with visitors across Scotland at 135 sampling points, these sampling points were at busy town or city centres, rural hotspots or key attractions. Fieldwork was not conducted at specific activity sites such as golf courses.

The survey focused on general sightseeing visitors to Scotland. It is unlikely to have picked up visitors who may have visited for a sole purpose trip such as a golf trip or cycling trip that was off the beaten track.

3.1 Activities: Key Insights

89% of visitors took part in at least one activity on their trip. The most popular activities were

- viewing architecture and buildings (52%)
- shopping (47%)
- hill walking (40%)
- watching wildlife (23%).

Long haul visitors were more likely to engage in many of the activities listed, particularly viewing architecture, guided tours, shopping as well as tracing ancestors.

European visitors over indexed on hillwalking, particularly Dutch visitors which can be linked to their strong desire to connect with nature.

A lower proportion of UK visitors engage with many activities but Scotland residents were more likely to take part in water sports or cycling when compared to visitors from further afield.

Pre-nesters appear to want an active break, more likely to engage with activities than other life stage groups.

Activities and experiences are a positive way for visitors to connect with Scotland's people. Visitors rated their experience of and satisfaction with activities highly, particularly the knowledge and passion of staff.

Value for money received lower ratings, in line with findings from VisitBritain MIDAS study which found that value for money as a weakness for Britain amongst international travellers.

3.2 Taking part in activities

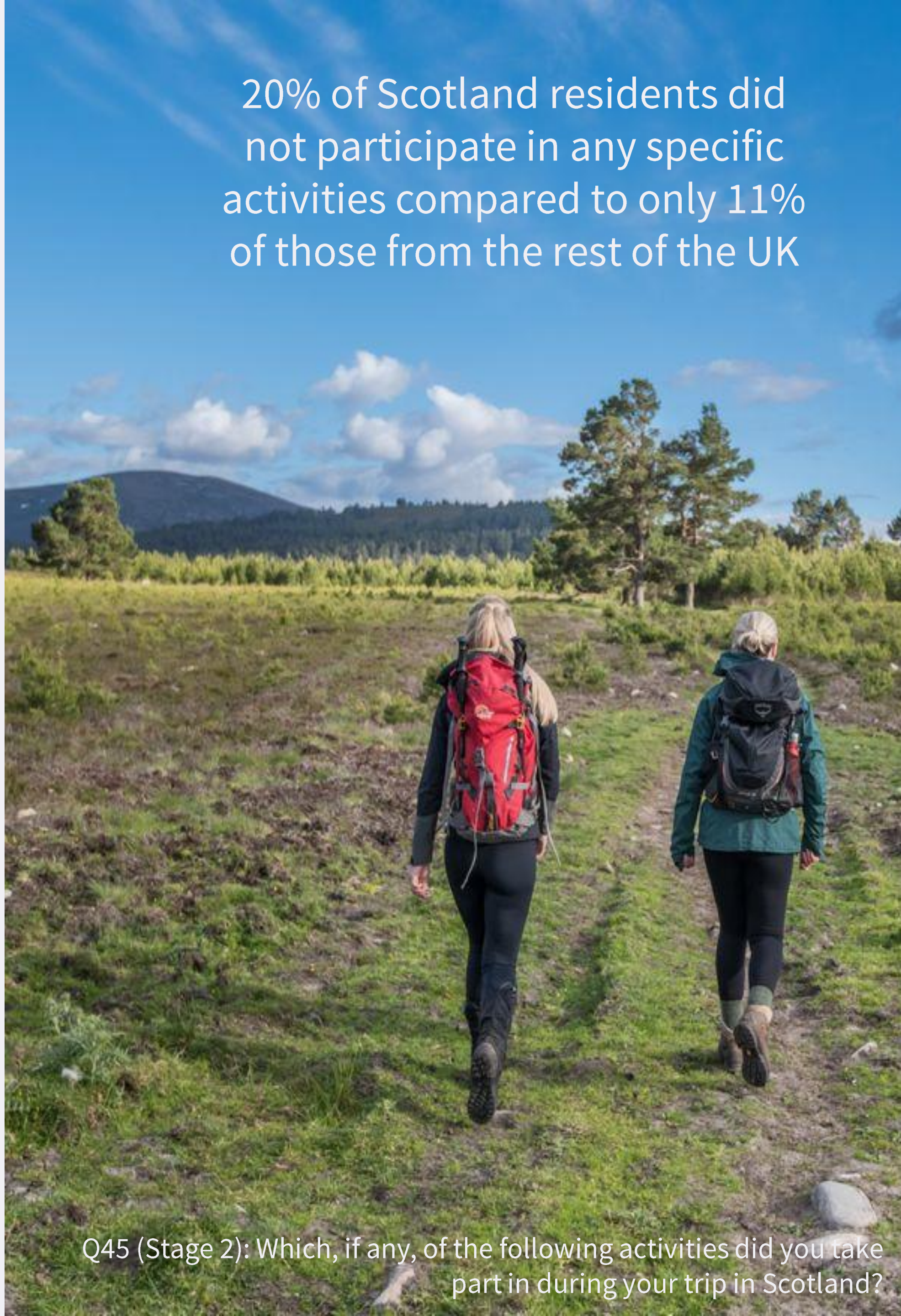
89%

The majority of visitors participated in at least one type of activity on their trip in Scotland

UK visitors	**87%**
European visitors	**91%**
Long haul visitors	**96%**

Long haul visitors were more likely to participate in an activity than visitors from the UK or Europe, highlighting their desire for an active holiday. This may also be linked to the higher level of first-time visitors amongst the long haul market.

Base (All): 3,011



20% of Scotland residents did not participate in any specific activities compared to only 11% of those from the rest of the UK

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

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3.3 Activities undertaken: top ten

Activities undertaken include elements of general sightseeing (viewed architecture, shopping and short guided tours), as well as specific activities such as hillwalking and watching wildlife.

52%
viewed architecture and buildings

47%
shopping

40%
hill walk, mountaineering, or hike

23%
watching wildlife or bird watching

21%
short guided tour

19%
boat trip

4%
played golf

4%
water sports or wind sports

4%
road cycling or touring

4%
genealogy or tracing ancestors

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Base (all): 3,011

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

3.4 Activities Undertaken: Market Summary

	Total sample	UK visitors	Europe visitors	Long haul visitors
Viewed architecture and buildings	52%	44%	59%	78%
Shopping	47%	43%	48%	64%
Hill walk, mountaineering, hike	40%	36%	51%	46%
Watching wildlife, birdwatching	23%	24%	21%	22%
Short guided tour	21%	14%	27%	46%
Boat trip	19%	17%	23%	23%
Played golf	4%	3%	3%	7%
Water sports, wind sports eg open water swim, bodyboarding, kite surfing	4%	4%	2%	2%
Road cycling or touring	4%	5%	3%	1%
Genealogy or tracing ancestors	4%	2%	1%	12%
Longer guided tour	3%	1%	4%	11%
Paddle sports eg kayaking, paddleboarding	3%	3%	1%	1%
Off road cycling eg mountain biking	3%	4%	1%	1%
Wellness activity eg yoga, spa, meditation	3%	3%	3%	3%
Base	**3,011**	**1,531**	**625**	**795**

3.5 Activities undertaken: UK visitors

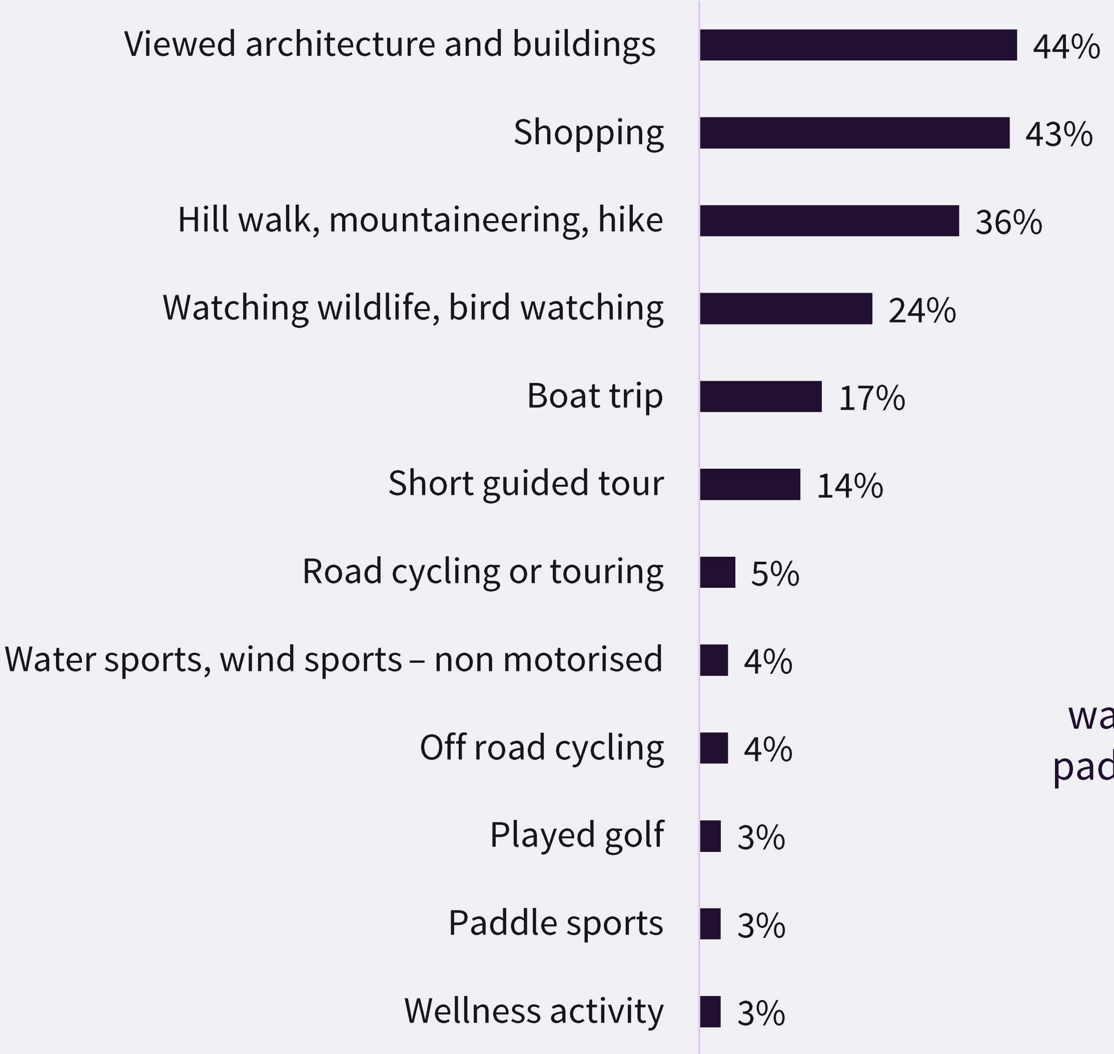
Top 5:

- Viewed architecture and buildings
- Shopping
- Hillwalking
- Watching wildlife
- Boat trip

Scotland residents over index on (more likely than other markets):

- Water sports
- Cycling

Responses below 3% are not shown



Scottish residents:
watersports 6%
paddle sports 5%

Base (all UK visitors): 1,531

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

3.6 Activities undertaken: European visitors

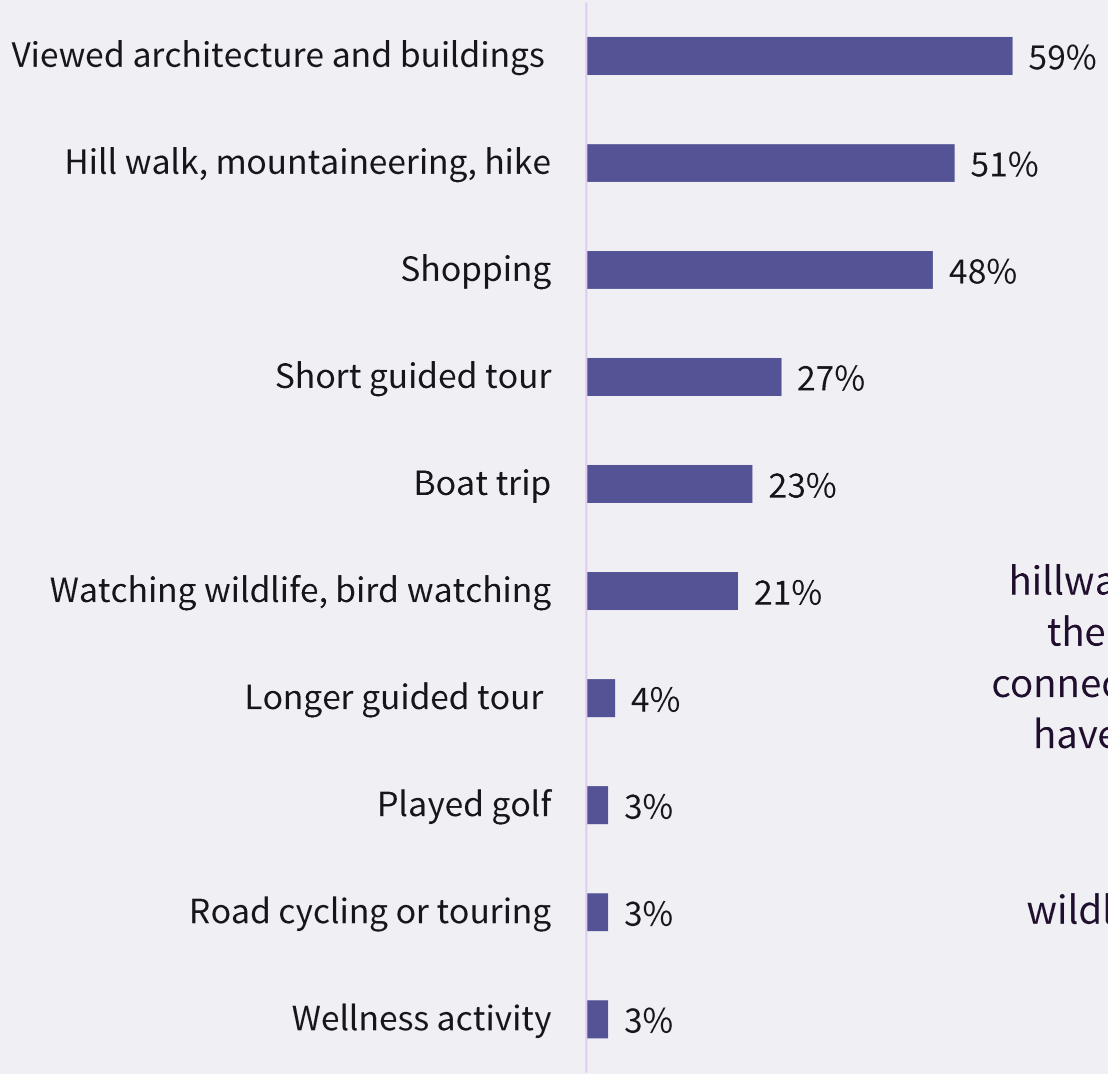
Top 5:

- Viewed architecture and buildings
- Hillwalking
- Shopping
- Short guided tour
- Boat trip

Over-index on (more likely than other markets):

- Hillwalking

Responses below 3% are not shown



Netherlands:
hillwalking 66% linked to their strong desire to connect with nature and to have an active holiday

France:
wildlife watching 34%

Base (all Europe visitors): 625

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

3.7 Activities undertaken: Long haul visitors

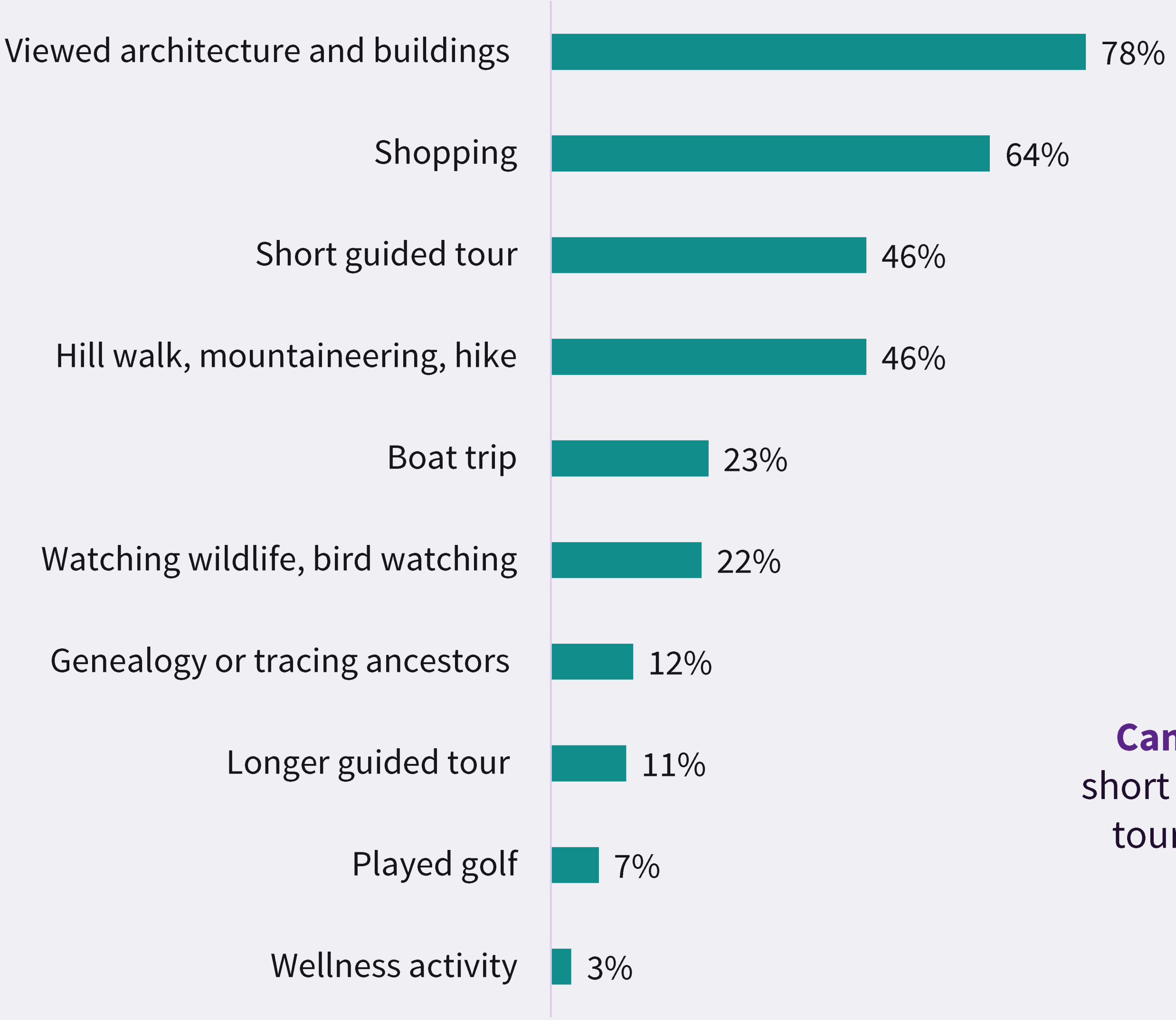
Top 5:

- Viewed architecture and buildings
- Shopping
- Short guided tour
- Hill walking
- Boat trip

Over index on (more likely than other markets):

- Guided tour (long or short)
- Viewed architecture
- Shopping
- Tracing ancestors

Responses below 3% are not shown



Canada: short guided tour 57%

Base (all Long Haul visitors): 795

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

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3.8 Activities undertaken: life stage

Pre-Nesters

Top activities:

- Hill walk, mountaineering etc. 57%
- Viewed architecture and buildings 57%
- Shopping 52%
- Short guided tour 30%

Over index on:

- **Hill walk, mountaineering etc. 57%**
- Viewed architecture and buildings 57%
- Shopping 52%
- Short guided tour 30%
- **Wellness activity 8%**

Families

Top activities:

- Viewed architecture and buildings 44%
- Shopping 44%
- Hill walk, mountaineering etc. 42%
- Watching wildlife 27%

Over index on:

- Hill walk, mountaineering etc. 42%
- **Water/wind sports 12%**
- **Paddle sports 12%**
- **Off road cycling 10%**
- **Organised adventure/adrenalin sports 6%**

Older independents

Top activities:

- Viewed architecture and buildings 52%
- Shopping 49%
- Hill walk, mountaineering etc. 41%
- Watching wildlife 24%

Over index on:

- Did not over-index on any activities

Retirement age

Top activities:

- Viewed architecture and buildings 53%
- Shopping 45%
- Hill walk, mountaineering etc. 31%
- Watching wildlife 22%
- Short guided tour 22%

Over index on:

- Did not over-index on any activities

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

Base (all): Pre-nesters 338; Families 327; Older independents 1,406; Retirement age 901

3.9 Activities undertaken: deep dive (1)

Pre-Nesters were more likely to have an active break by undertaking hill walking than other life stages.

First time visitors were more likely to soak up general sightseeing via short guided tours and viewing architecture and buildings than repeat visitors.

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A. Hill walk, mountaineering, hike or ramble

Pre nesters	Families	Older independents	Retirement age
57%	42%	41%	31%

Base (all): Pre-nesters 338; Families 327; Older independents 1,406; Retirement age 901

B. First time versus repeat visitors

Activity	First time visitors	Repeat visitors
Viewed architecture and buildings	70%	49%
Went on a short guided tour, i.e. a tour lasting a day or less	40%	17%

Base (all): First time visitor 932; Repeat visitors 2,079

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

3.10 Activities undertaken: deep dive (2)

Visitors who were on a **trip of a lifetime** were highly engaged with general sightseeing via viewing architecture, shopping and guided tours.

Visitors who were **touring around two or more locations** on their trip to Scotland were also highly engaged with general sightseeing and also hill walking.

C. Visitors on the trip of a lifetime

Activity	Trip of a lifetime	Other visitors
Viewed architecture and buildings	71%	54%
Shopping	60%	48%
Short guided tour	41%	23%

Base (all): Visitors on the trip of a lifetime 309; Other visitors 2,702

D. Visitors who toured around two or more locations

Activity	Touring visitors	Other visitors
Viewed architecture and buildings	65%	20%
Hill walking	52%	33%
Short guided tour	30%	16%

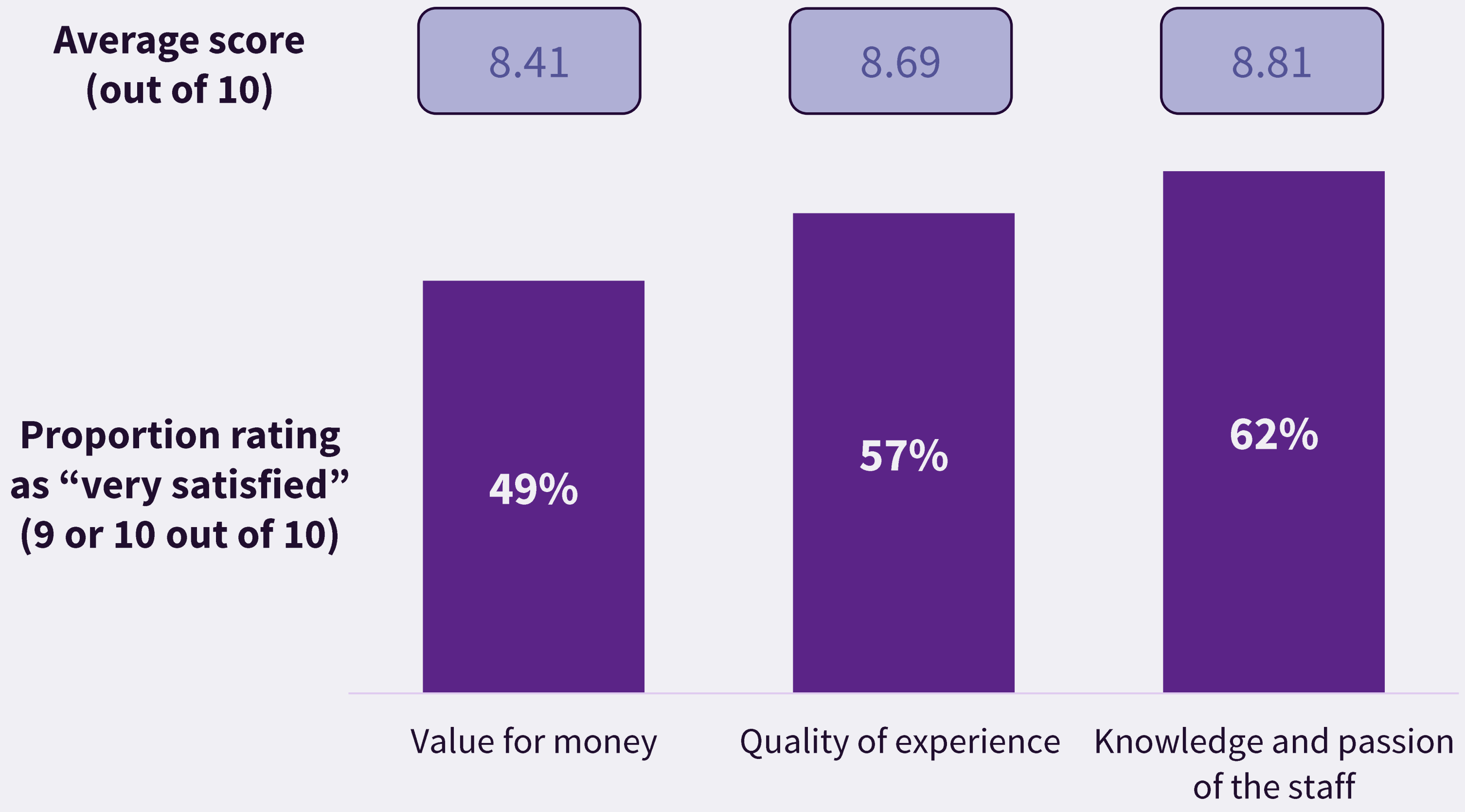
Base (all): Toured around Scotland, staying in 2 or more places 1,741; Other visitors 1,270

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

3.11 Satisfaction with paid activities and experiences

62% of visitors were very satisfied with the knowledge and passion of staff at activities/experiences (9 or 10 out of 10), rising to 69% for long haul visitors.

Knowledge and passion of staff scored highly amongst visitors. Value of money is a lower scoring category which is similar to other aspects of the visitor experience. This mirrors VisitBritain's Midas research (2022) which found that value for money was a weakness for Britain amongst international travellers.



Base (all): 3,011

Q50 (Stage 2): Thinking about the activities you did and attractions you visited, overall how satisfied or dissatisfied were you with the following?

3.12 Booking elements of the trip:

Long haul visitors are more likely to book activities and experiences in advance of their arrival in Scotland.

	UK	Europe	Long haul
Booked accommodation directly with the provider	64%	39%	54%

	UK	Europe	Long haul
Booked transport directly with the provider	29%	67%	67%

	UK	Europe	Long haul
Booked activities and experiences in advance of arrival	29%	44%	63%
(Those who booked in advance) Booked activities and experiences directly with a provider	89%	78%	71%

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3.13 Food and drink experiences

In this section, we wanted to understand if there were specific food or drink experiences that visitors were taking part in (in addition to general 'eating out').

Almost half of visitors participated in a food or drink experience, rising to 62% for long haul visitors. Visiting a farm shop or farmers' market was mentioned by over one in five visitors.

Food and drink experiences were particularly appealing to long haul visitors.

Base (all): 3,011

Q47 (Stage 2): Which, if any, of the following food and drink experiences did you take part in during your trip in Scotland?

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3.14 Taking part in food and drink experiences

46% of visitors took part in at least one food and drink experience during their trip in Scotland

This rose to 62% for long haul visitors

UK visitors	**43%**
European visitors	**44%**
Long haul visitors	**62%**

Visitors from the USA were more likely to mention food and drink as a reason for choosing Scotland than other markets. When here, 65% stated they took part in at least one food and drink activity.

Based on Net figures, showing the total proportion who mentioned at least one activity

Base (All): 3,011

Q6 (Stage 2): Thinking of your recent trip, which, if any, of these reasons initially attracted you to choose Scotland for your recent trip?

3.15 Food and drink experiences: market summary

Deep Dive

	Total sample	UK visitors	Europe visitors	Long haul visitors
Visited a farm shop or farmer's market	22%	23%	17%	21%
Fine dining restaurant	14%	11%	11%	25%
A food activity e.g. cookery class, afternoon tea	9%	5%	13%	23%
A food or drink event or festival	3%	2%	4%	6%
A food and drink tour e.g. walking tour	3%	1%	5%	9%
Other food and drink experience	10%	11%	8%	9%
None	54%	57%	56%	38%
Base	**3,011**	**1,531**	**625**	**795**

Q47 (Stage 2): Which, if any, of the following food and drink experiences did you take part in during your trip in Scotland?

4. Events

Interpretation note:
Please note that the sample comprises **leisure overnight visitors only.** The results do not include the experience of day visitors who may be an important market for some activity providers or event organisers.

In addition, whilst the survey involved short face to face interviews with visitors across Scotland at 135 sampling points, these sampling points were at busy town or city centres, rural hotspots or key attractions. Fieldwork was not conducted at specific events as this would significantly skew the data particularly at a regional level.

The survey has focused on general visitors to Scotland and is unlikely to have picked up visitors who may have visited for a sole purpose trip such as attending a large scale event or a business meeting or conference.

4.1 Attending events

28%

of all visitors participated in at least one type of event on their trip in Scotland in 2023

This rises to 38% for long haul visitors

UK visitors	24%
European visitors	36%
Long haul visitors	38%

Base (All): 3,011

Q45 (Stage 2): Which, if any, of the following activities did you take part in during your trip in Scotland?

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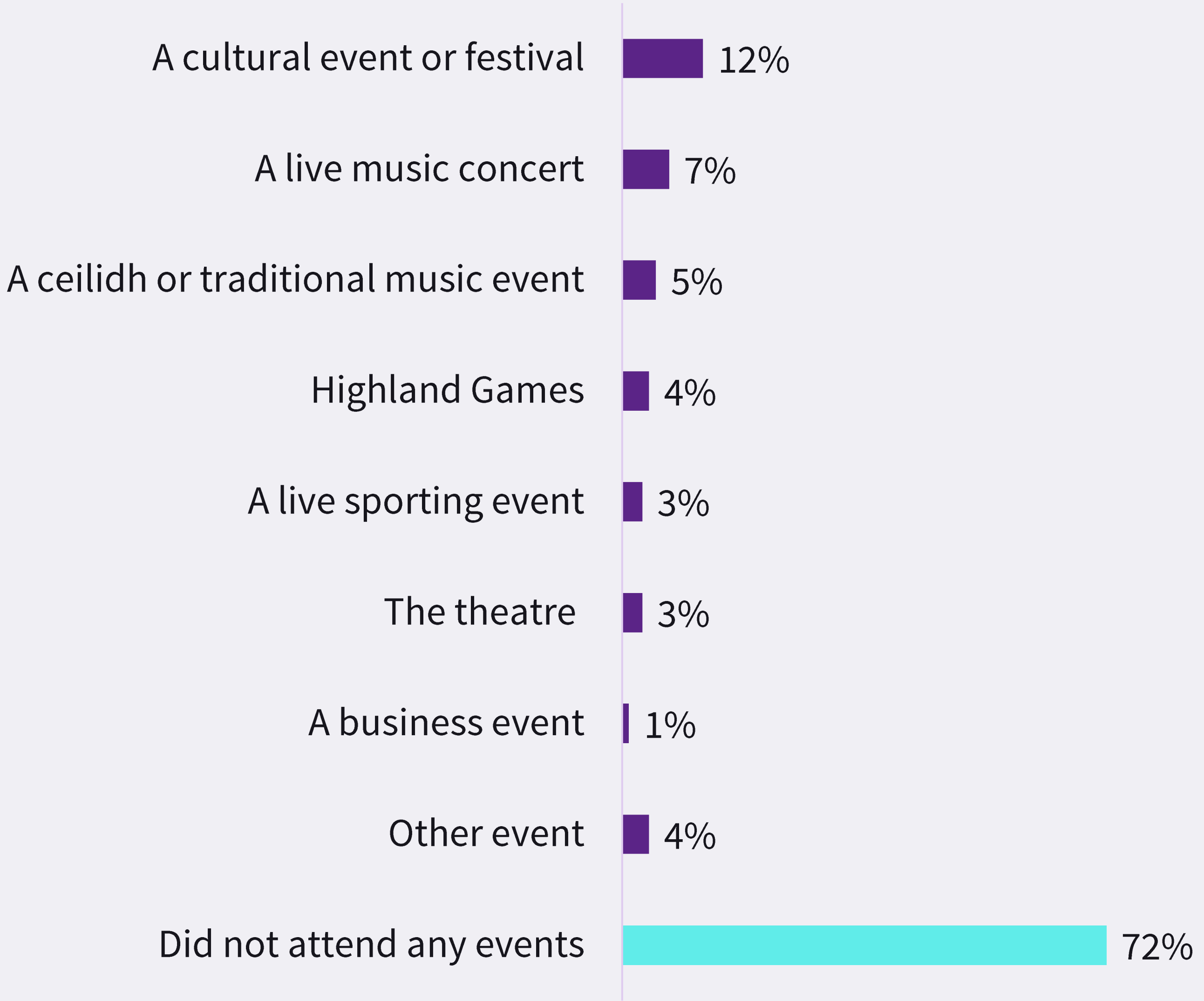
4.2 Events Attended: Full List

Just over a quarter of the total sample attended an event. Cultural events were the most popular.

Those visiting from Europe and long haul countries were more likely to attend an event than UK visitors.

Long haul visitors were more likely to attend a ceilidh or traditional music event (12%) compared to Europe (7%) and UK (3%).



Base (all): 3,011

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

4.3 Events Attended: UK Visitors

24% of UK visitors attended an event during their trip in Scotland.

A mix of events were attended including cultural events and music concerts.

There were no differences in attendance of events between Scotland and rest of UK visitors.

Base (all UK visitors): 1,531

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

4.4 Events attended: European visitors

36% of visitors from Europe attended an event during their trip in Scotland.

The most popular were cultural events followed by live music concerts.

Visitors from Spain/Italy (49%) and France (45%) were more likely to attend an event than those from Germany (30%) and the Netherlands (30%).

Visitors from Spain/Italy were more likely to attend a music concert (20%) than those from other European countries.

Base (all Europe visitors): 625

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

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4.5 Events attended: long haul visitors

38% of long haul visitors attended an event, with cultural events, ceilidhs and live music being the most popular.

Visitors from Canada were more likely to attend events (46%) than other long haul markets and more likely to attend a cultural event (29%) than USA (16%) or Australasia (15%) visitors.

Base (all Long Haul visitors): 795

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

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4.6 Events Attended: Life stage

Families were more likely to go to a Highland games and less likely to attend a music concert than other life stage groups.

First time visitors were more likely to attend an event (32%) than repeat visitors (26%).

Event Attendance	Pre nesters	Families	Older independents	Retirement age
Highland Games	3%	7%	4%	3%
Live music concert	9%	5%	8%	8%

Base (all): Pre-nesters 338; Families 327; Older independents 1,406; Retirement age 901

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

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4.7 Events Attended: Additional analysis

Those on a **trip of a lifetime** were more likely to attend a cultural event, music concert, Highland games or a ceilidh than those not.

Those staying in **rural locations** were less likely to attend events (15%) compared to those touring (34%) or staying in an urban area (29%).

Event Attendance	Trip of a lifetime	One off holiday/short break	Regular holiday/short break	Special holiday/short break
A cultural event or festival	**18%**	**11%**	**11%**	**14%**
A ceilidh or traditional music event	**14%**	**4%**	**4%**	**8%**
A live music concert	**12%**	**6%**	**7%**	**10%**
Highland Games	**7%**	**2%**	**4%**	**4%**

Base (all): Trip of a lifetime 218; One off holiday/short break 427; Regular holiday/short break 1,217; Special holiday/short break 573

Q46 (Stage 2): Which, if any, of the following types of event did you attend during your trip in Scotland?

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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