SCOTLAND VISITOR SURVEY 2023

FOOD AND DRINK

1. Is food and drink a motivator for choosing Scotland?
2. What food and drink experiences did visitors take part in?
3. How important was locally sourced food to visitors?
4. How satisfied were visitors with aspects of the food and drink experience?

May 2024

Contents

Food and drink

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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

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

Key Insights

- A nation's food and drink offering can add character and authenticity to the visitor's destination experience. The results show that long haul visitors in particular are engaging with food and drink as a way to experience Scotland
- Over a quarter (26%) of visitors visited a whisky, gin distillery or brewery (net figure) in 2023. German visitors and visitors from the USA were particularly keen to visit a whisky distillery
- Almost half of visitors (46%) took part in a specific food and drink activity. Long haul visitors again were more likely to engage in food and drink activities
- 36% of visitors stated that experiencing locally produced food and drink was important to them (9 or 10 out of 10)
- Service provided by staff and the quality of food and drink available scored highly amongst visitors. Value for money of eating out was a lower scoring area for food and drink and across other areas of the visitor experience. This mirrors findings from VisitBritain's MIDAS report (2022) which found that poor value for money was a weakness for Britain relative to competitors (in relation to international travellers)

1. The role of food in choosing a holiday or short break destination

Food is not typically a primary driver for choosing a holiday or short break destination (9%). The need for rest and relaxation , connecting with family and friends or connecting with the outdoors are stronger drivers for taking a holiday.

However, for some audiences, food and drink plays a more important role as a reason for picking Scotland as their destination of choice (15%).

Food and drink is an important aspect deeper into the visitor journey, as it's a way to engage with authentic and local experiences, adding to the enjoyment of the destination.

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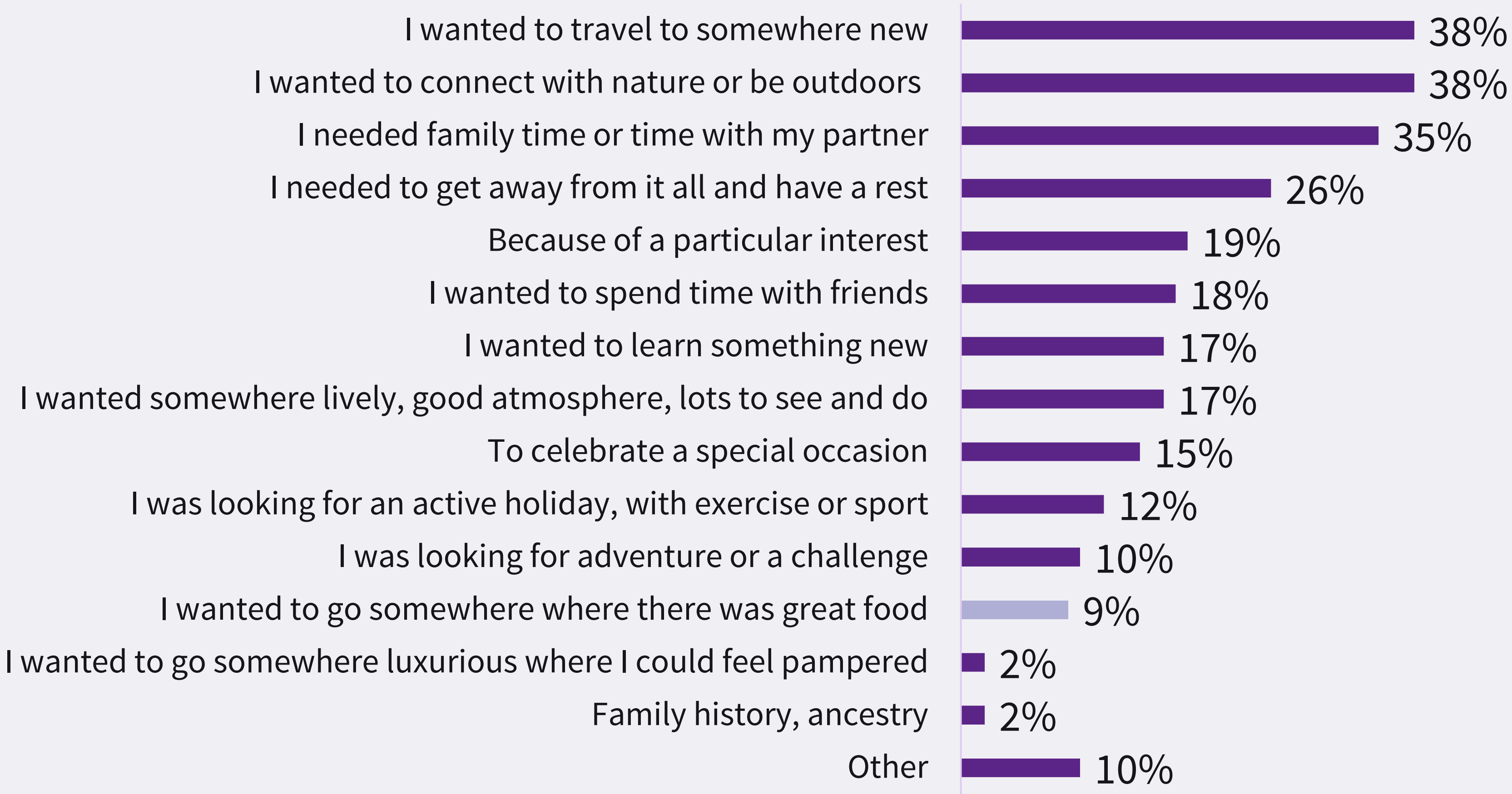
1.1 Drivers for taking a holiday

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

9% stated that they 'wanted to go somewhere where there was great food'

Food is typically not a primary driver for taking a holiday but it has a crucial role later in the visitor journey, as part of the visitor experience



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

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1.2 Reasons for choosing Scotland

In this section, we wanted to understand the reasons why people choose Scotland.

15% of visitors highlighted that ‘Scotland’s food and drink’ was a reason for choosing Scotland

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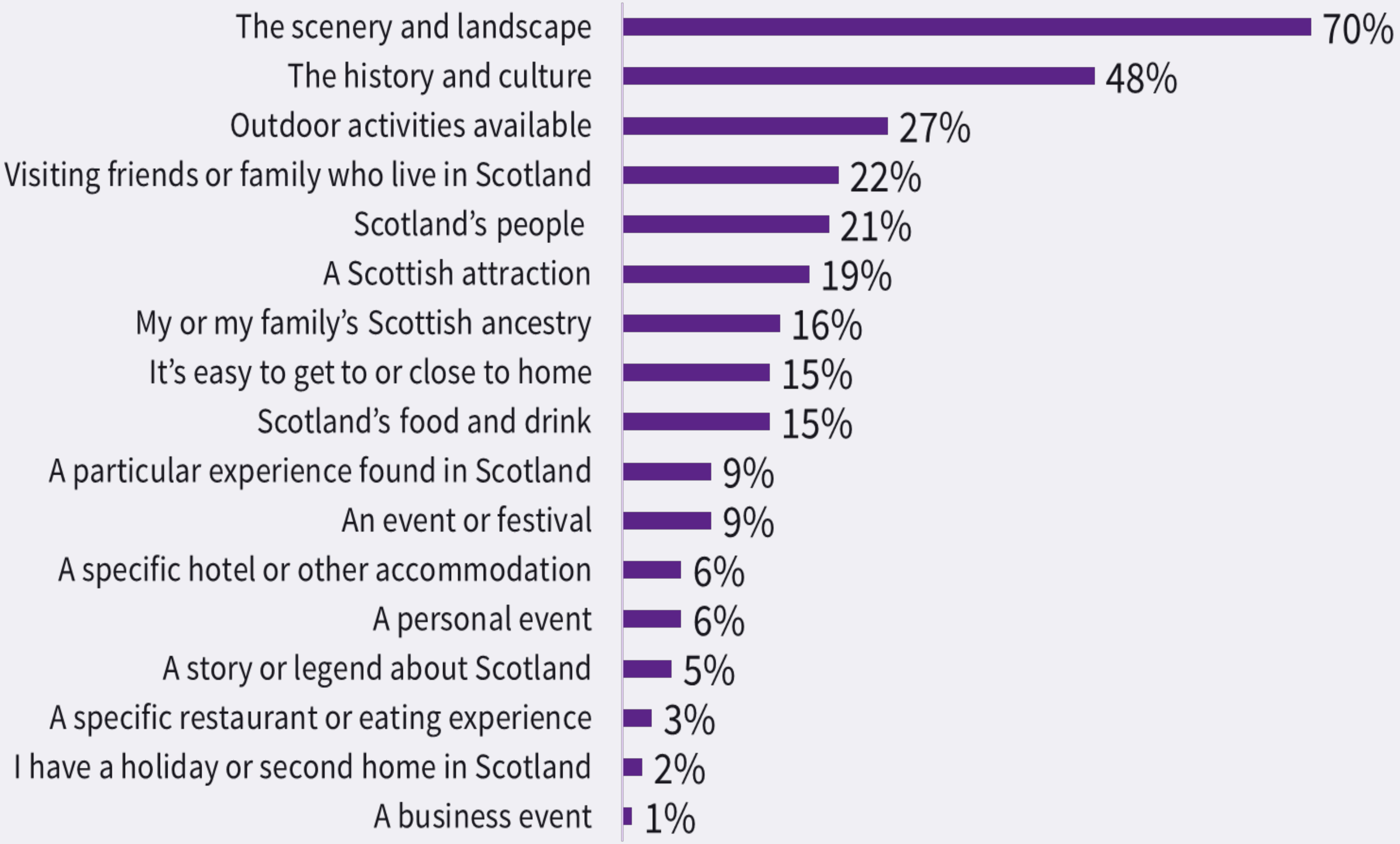
Scotland’s scenery and history and culture remain the core reasons for choosing Scotland but food and drink also plays a role



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

Base (all): 3,011

1.3 Reasons for choosing Scotland: market summary

15% of visitors highlighted that 'Scotland's food and drink' was a reason for choosing Scotland.

This rose to

19% for long haul visitors

UK visitors	**14%**
European visitors	**14%**
Long haul visitors	**19%**

Visitors from the USA were more likely to mention food and drink as a reason for choosing Scotland than other markets.

German visitors were more likely to mention food and drink compared to French or Dutch visitors.

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?

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2. Attractions visited

26% of visitors visited a whisky, gin distillery or brewery

(This is a net figure showing the proportion that visited at least one of these types of attraction)

21% Visited a whisky distillery

5% Visited a gin distillery

6% Visited a brewery

Base (all): 3,011

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

2.1 Visited a whisky distillery

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

UK Visitors
13%

Rest of UK: 15%

Scotland: 7%

Long haul visitors
42%

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?

2.2 Visited a whisky distillery

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

Germany: 51%

France: 37%

Netherlands: 37%

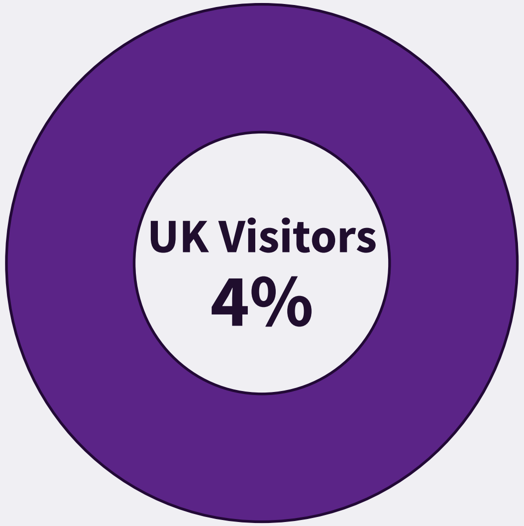
Spain/Italy: 32%

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

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

2.3 Visited a gin distillery

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



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?

2.4 Visited a gin distillery

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

Germany: 11%

France: 8%

Netherlands: 6%

Spain/Italy: 4%

2.5 Visited a brewery

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

Rest of UK: 5%

Scotland: 4%

USA: 17%

Canada: 12%

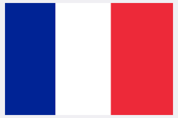
Australasia: 11%

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

2.6 Visited a brewery

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

Germany: 3%



France: 12%

Netherlands:6%

Spain/Italy: 6%

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

3. 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?

3.1 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%

We saw earlier that 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?

3.2 Food and drink experiences: markets

Deep Dive

Farm shop or farmers' market
All visitors 22%

Australasia: 30%

Rest of UK: 24%

Fine dining
All visitors 14%

USA: 28%

Food and drink activities e.g. cookery class, afternoon tea
All visitors 9%

USA: 25%

Canada: 18%

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

3.3 Food and drink experiences: market summary

Deep Dive

	Total sample	UK visitors	Europe visitors	Long haul visitors
Visited a farm shop or farmers 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. The importance of experiencing locally produced food and drink

In this section, we wanted to understand how important it was to visitors to experience locally produced food and drink whilst on their trip in Scotland

36% of visitors stated it was important (9 or 10 out of 10)

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Experiencing locally produced food and drink has particular appeal to long haul markets. But the definition of 'local' may be different for visitors, dependent on their knowledge of Scotland. Long haul visitors may consider local to be Scottish.

	Important Top 2 Box scores (9 or 10 out of 10 where 10 is extremely important)	**Extremely important (10 out of 10)**
All visitors	36%	22%
UK visitors	33%	20%
European visitors	37%	21%
Long haul visitors	48%	30%

Base (all): 3,011

Q51 (Stage 2): How important or unimportant was it to you to experience locally produced food and drink whilst on your trip in Scotland?

4.1 The importance of locally produced food and drink: individual markets

36% of visitors stated it was important (9 or 10 out of 10)

51% of visitors from the USA stated it was important (9 or 10 out of 10)

USA: 51%

Canada: 48%

Australasia: 40%

Scotland: 34%

Rest of UK: 32%

Base (All): 3,011

Q51 (Stage 2): How important or unimportant was it to you to experience locally produced food and drink whilst on your trip in Scotland?

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4.2 The importance of locally produced food and drink: individual markets

36% of visitors stated it was important (9 or 10 out of 10)

France: 42%

Germany: 42%

Netherlands: 22%

Spain/Italy: 41%

Base (All): 3,011

Q51 (Stage 2): How important or unimportant was it to you to experience locally produced food and drink whilst on your trip in Scotland?

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5. Satisfaction with the food and drink experience

Service and quality of food and drink available scored highly amongst visitors. Across the visitor experience, value for money is a low scoring category for other aspects of the experience, but it is particularly low for food and drink. This mirrors VisitBritain's Midas research (2022) which found that value for money was a weakness for Britain amongst international travellers.

	Mean score	9 or 10 out of 10
Service provided by staff	8.59	55%
Quality of food and drink available	8.32	48%
Variety/selection of food to meet my dietary requirements (e.g. vegan, plant based, dairy free)	8.30	50%
Finding places serving food when I wanted	8.07	44%
Availability of local produce when eating out	8.02	37%
Value for money of eating out	7.76	32%

5.1 Value for money of eating out

32% of visitors rated 'the value for money of eating out' as very good
(9 or 10 out of 10)

UK visitors:
33%

European visitors:
16%

Long haul visitors:
40%

Q52 (Stage 2): Thinking about your experiences of food and drink during your holiday or short break in Scotland, overall, how satisfied or dissatisfied were you with the following?

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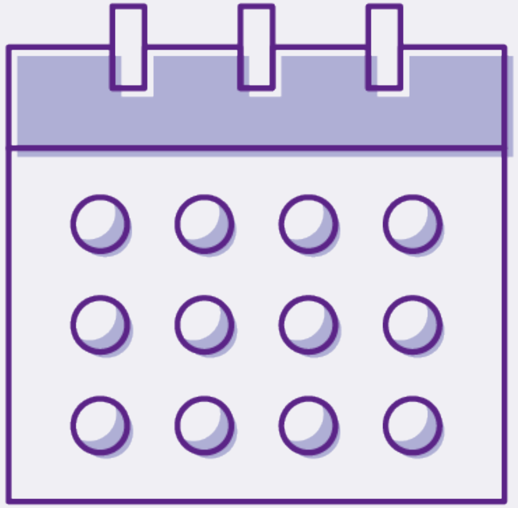
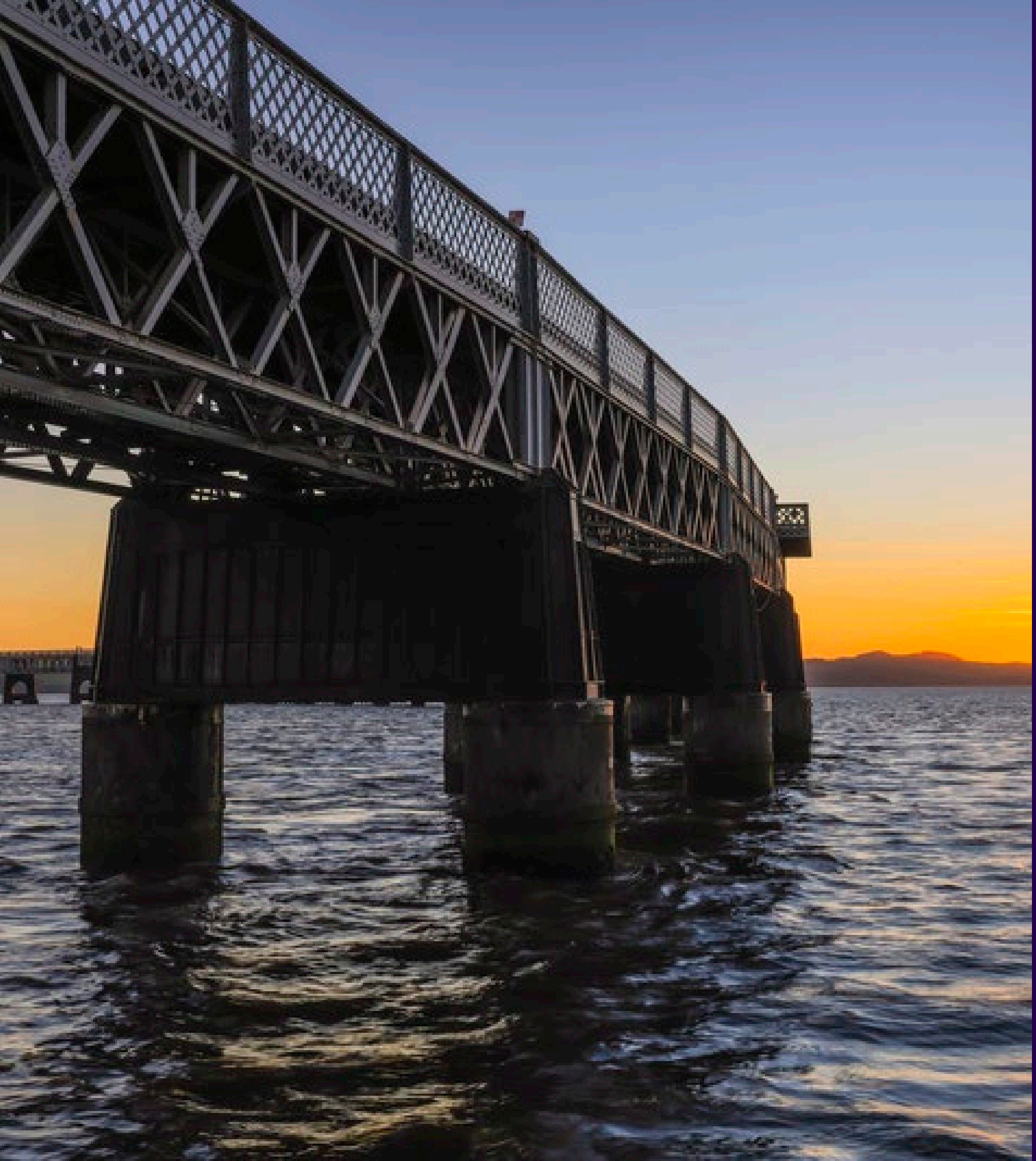
6. Definitions used within this report

- 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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