


Scotland Visitor Survey 2023

Introduction

The Scotland Visitor Survey was conducted by Progressive Partnership on behalf of VisitScotland to enhance understanding of visitor behaviour and experience in Scotland. In total, 11,573 visitors were interviewed in Scotland between March and October 2023, with 3,011 responding to an online survey on their return home.


Overall, **1041** overnight visitors to the Highlands (excluding Inverness) completed the online survey. The results shown below are based on these visitors to the Highlands. Results for visitors to Inverness are shown in a separate factsheet.

Profile of overnight visitors to the Highlands



**47% Domestic visitors**


- 12% Scotland (residents)
- 35% Rest of UK



**53% International visitors**

- 22% Europe
- 30% Long haul including:
  - 22%: North America
  - 7%: Australasia
  - 1% Rest of World

*Base: Stage 2 online survey Highlands visitors 1041*



**Average number in travel party: 2.6**

**Children (under 16) in party: 13%**

**Life Stage**

Pre-nesters	13%
Families	12%
Older Independents	48%
Retirement Age	27%

*Base: Stage 2 online survey Highlands visitors 1041*      *Base: Stage 2 Highlands visitors excluding n/a 1025*

Profile of trip




Highlands visitors stayed on average **11.2 nights** in total in Scotland including **4.1 nights** in Highlands



**85%** of visitors to Highlands toured around Scotland, staying in two or more places

*Base: Stage 2 online survey Highlands visitors 1041*



**First time visitor: 37%**  
**Repeat visitor: 63%**

Average proportion of first-time visitors to Scotland: 25% (Scotland-wide sample)

**Examples of Type of Trip**

- A trip of a lifetime: 15%
- A special holiday/short break: 28%

*Base: Stage 2 online survey Highlands visitors 1041*      *Base: Stage 2 Highlands visitors excluding Scotland residents 945*

## Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Highlands sample
1	The scenery and landscape	85%
2	The history and culture	59%
3	Outdoor activities available	40%
4	Scotland's people	27%
5	A Scottish attraction	20%
6	My or my family's Scottish ancestry	18%
7	Visiting friends or family	17%
8	Scotland's food and drink	15%
9	A particular experience found in Scotland	11%
10	It's easy to get to or close to home	9%
Base: All visitors to Highlands (stage 2)		1,041

Rank	Top ten reasons for choosing Scotland	Scotland-wide sample
1	The scenery and landscape	70%
2	The history and culture	48%
3	Outdoor activities available	27%
4	Visiting friends or family	22%
5	Scotland's people	21%
6	A Scottish attraction	19%
7	My or my family's Scottish ancestry	16%
8	Scotland's food and drink	15%
9	It's easy to get to or close to home	15%
10	An event or festival	9%
Base: All visitors to Scotland (stage 2)		3,011

## Type of accommodation used in the Highlands

### 50% stayed in serviced accommodation



34%

Hotel, motel, inn



19%

Guest house, B&B



4%

Hostel

Base: Stage 2 Highlands visitors (priority region) 590

Note: serviced and non-serviced adds to more than 100% due to some people staying in more than one accommodation type.

### 60% stayed in non-serviced accommodation



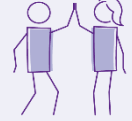
29%

Self-catering/  
commercial non-  
serviced rentals



26%

Camping, caravan,  
motorhome

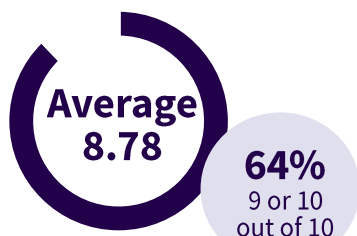


4%

Friend's or  
relative's home

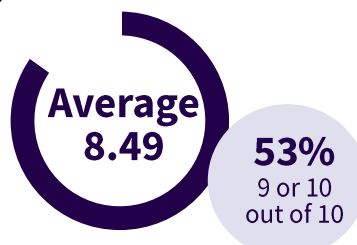
## Satisfaction with accommodation in the Highlands

### Satisfaction with... (Scored out of 10)



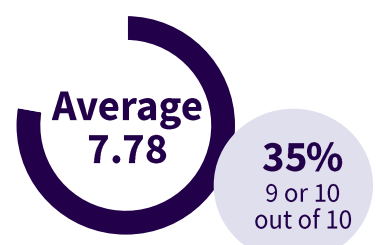
**Overall welcome  
provided to you**

Scotland-wide sample 62%  
(9 or 10 out of 10)



**The knowledge of staff/host  
(at accommodation) about  
things to do in the area**

Scotland-wide sample 53%  
(9 or 10 out of 10)

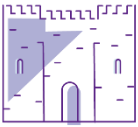


**The value for money  
of accommodation**

Scotland-wide sample 42%  
(9 or 10 out of 10)

Base: Stage 2 Highlands visitors in paid for accommodation excl. n/a 850 - 985

Attractions and activities undertaken in Highlands



Top 5 attractions or activities undertaken/visited in Highlands

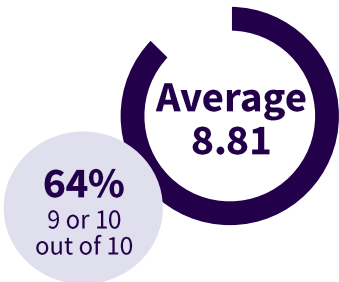
Rank	Attractions and activities undertaken in Highlands	Highlands sample
1	Hill walk, mountaineering, hike, ramble	56%
2	A castle or fort	50%
3	A nature reserve	38%
4	A visitor or heritage centre	32%
5	Shopping	31%
Base: Took part in activities/attractions in Highlands		584

Rank	Attractions and activities undertaken in Scotland	Scotland-wide sample
1	A castle or fort	59%
2	Viewed architecture and buildings	52%
3	A museum or art gallery	50%
4	A historic house, palace, stately home	49%
5	Shopping	47%
Base: Took part in activities/attractions in Scotland		3,011

Satisfaction with attractions in Highlands

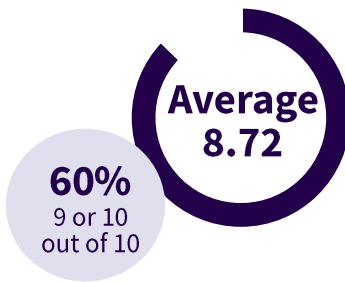
Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions



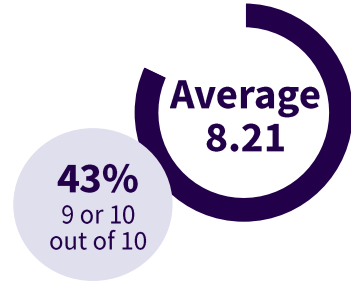
Scotland-wide sample 64%  
 (9 or 10 out of 10)

Quality of experience at attractions



Scotland-wide sample 57%  
 (9 or 10 out of 10)

Value for money of paid for attractions



Scotland-wide sample 47%  
 (9 or 10 out of 10)

Base: Stage 2 Took part in activities/attractions in Highlands excl. n/a 522-547

**Food and drink experiences in Highlands**



**26% took part in food and/or drink experiences in Highlands**

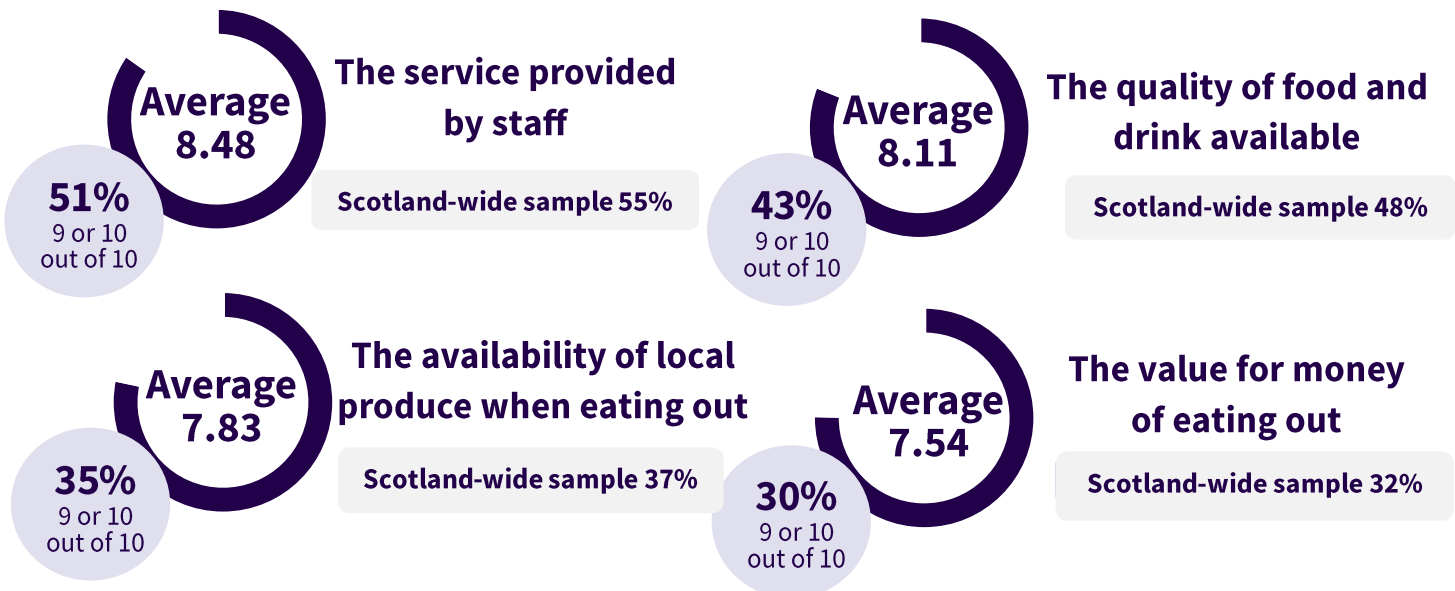
Key food and drink experiences included:

- 14% visited a farm shop/farmers market
- 8% visited a fine dining restaurant
- 2% undertook a food or drink activity e.g. cookery class

Base: Stage 2 Took part in activities/attractions in Highlands 584

**Satisfaction with food and drink experiences in Highlands**

*Satisfaction with..... (Scored out of 10)*



Base: Stage 2 Highlands visitors excl. n/a 977-1026

**Overall experience and likelihood to recommend Highlands**

**Positive rating of holiday/short break experience**  
(9 or 10 out of 10)

**71% Highlands**

71% for Scotland overall (Scotland-wide sample)

**Likelihood to recommend as a holiday/short break destination**  
(9 or 10 out of 10)

**82% Highlands**

82% for Scotland overall (Scotland-wide sample)

Base: Stage 2 Highlands visitors (priority region) 590

## Appendix: Interpreting the results

- The Scotland Visitor Survey should not be viewed in isolation.
- The survey collates views on a wide range of topics to understand visitor attitudes and behaviours.
- This data supplements data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level by;
  - The Great Britain Tourism Survey (GBTS) which estimates the volume and value of domestic tourism - from within Scotland and the rest of Great Britain
  - The International Passenger Survey (IPS) which provides details of tourism from abroad
- The Scotland Visitor Survey is undertaken during spring, summer and autumn seasons only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Scotland between March and October 2023 only.
- The sample comprises leisure overnight visitors only, and as such the following are excluded: visitors on a day trip from home, those on a business trip, cruise ship visitors.
- The base size varies across questions. Visitors could have stayed in multiple locations, therefore the questionnaire was designed to ask specific questions about accommodation and satisfaction with their experience overall in up to two priority regions. Where the base size of 1041 is used this includes all visitors who stayed in Highlands during their trip. Where the base size is 590 this shows results for the visitors who were allocated Highlands as their priority region and were asked more detailed questions. The base size refers to the unweighted base.
- Figures may not always add to 100% as this may be due to rounding within the data analysis or where respondents have answered more than one category.
- The following questionnaire wording was used to describe the area: Highlands and Isle of Skye (including Aviemore, Fort William, The Cairngorms)
- Both face-to-face and online data were weighted to reflect the profile of visitors measured by the GBTS and the IPS. The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region.
- Browse our [Scotland Visitor Survey page](https://visitscotland.org/scotland-visitor-survey) on visitscotland.org for more information on this survey.

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