

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, **233** overnight visitors to Aberdeenshire completed the online survey. The results shown below are based on these visitors to Aberdeenshire.

Profile of overnight visitors to Aberdeenshire



71% Domestic visitors

- 16% Scotland (residents)
- 55% Rest of UK

Base: Stage 2 online survey Aberdeenshire visitors 233



29% International visitors

- 11% Europe
- 17% Long haul including:
 - 13% North America
 - 4% Australasia
 - 1% Rest of World



Average number in travel party: 2.4

Children (under 16) in party: 14%

Base: Stage 2 online survey Aberdeenshire visitors 233

Life Stage

Pre-nesters	8%
Families	14%
Older Independents	39%
Retirement Age	39%

Base: Stage 2 Aberdeenshire visitors excluding n/a 230

Profile of trip



Aberdeenshire visitors stayed on average 10.8 nights in total in Scotland including 4.9 nights in Aberdeenshire

Base: Stage 2 online survey Aberdeenshire visitors 233



25% of visitors to Aberdeenshire stayed in one countryside or rural location



First time visitor: 20%
Repeat visitor: 80%

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

Base: Stage 2 Aberdeenshire visitors 233

Examples of Type of Trip

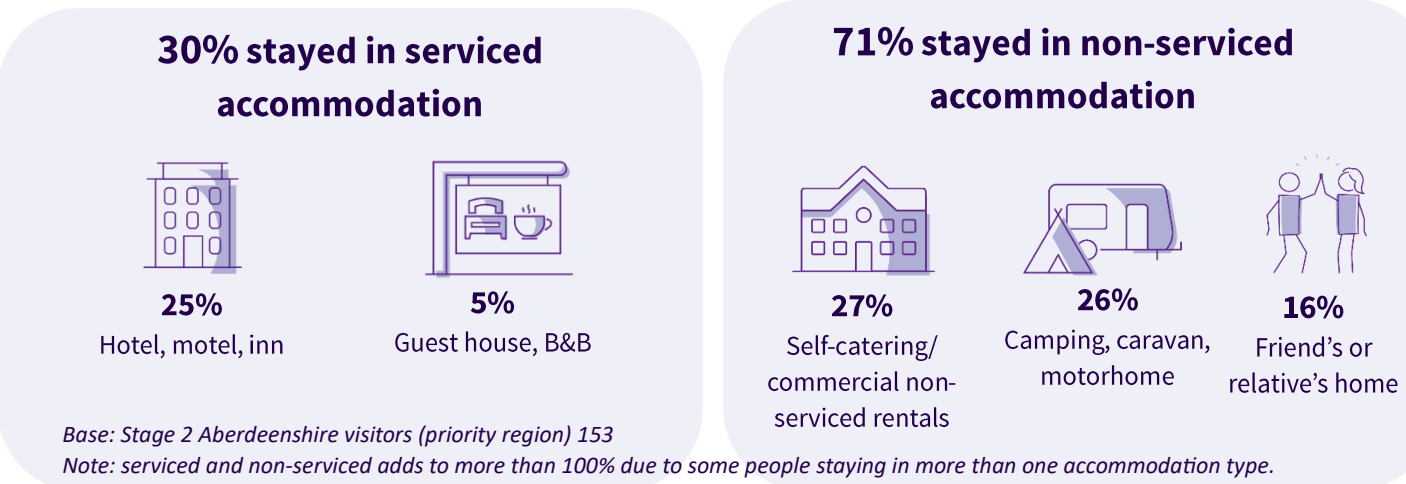
- A trip of a lifetime: 8%
- A special holiday/short break: 24%

Base: Stage 2 Aberdeenshire visitors excl. Scotland residents 207

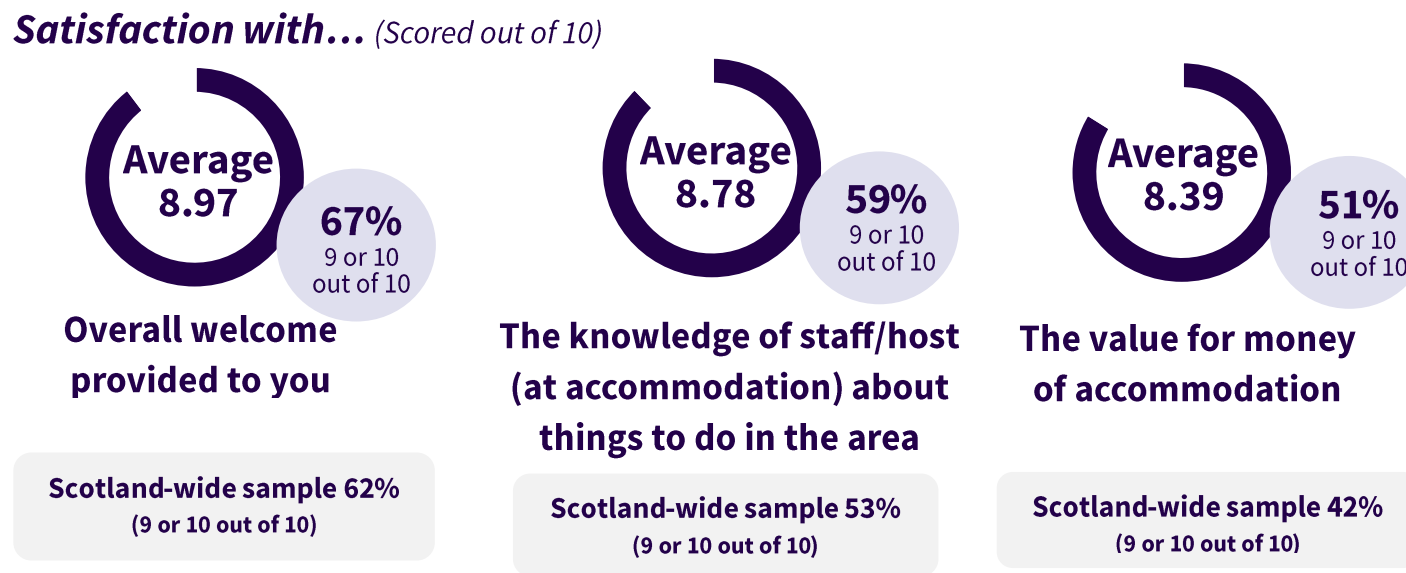
Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Aberdeenshire sample	Rank	Top ten reasons for choosing Scotland	Scotland-wide sample
1	The scenery and landscape	70%	1	The scenery and landscape	70%
2	The history and culture	53%	2	The history and culture	48%
3	Outdoor activities available	36%	3	Outdoor activities available	27%
4	Visiting friends or family	28%	4	Visiting friends or family	22%
5	Scotland's people	22%	5	Scotland's people	21%
6	My or my family's Scottish ancestry	16%	6	A Scottish attraction	19%
7	A Scottish attraction	15%	7	My or my family's Scottish ancestry	16%
8	Scotland's food and drink	15%	8	Scotland's food and drink	15%
9	It's easy to get to or close to home	11%	9	It's easy to get to or close to home	15%
10	An event or festival	9%	10	An event or festival	9%
Base: All visitors to Aberdeenshire (stage 2)		233	Base: All visitors to Scotland (stage 2)		3,011

Type of accommodation used in Aberdeenshire

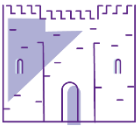


Satisfaction with accommodation in Aberdeenshire



Base: Stage 2 Aberdeenshire visitors in paid for accommodation excluding n/a 169 - 201

Attractions and activities undertaken in Aberdeenshire



Top 5 attractions or activities undertaken/visited in Aberdeenshire

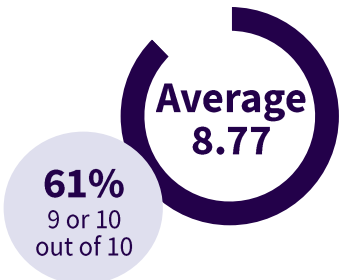
Rank	Attractions and activities undertaken in Aberdeenshire	Aberdeenshire sample
1	A castle or fort	48%
2	A historic house, palace, stately home	44%
3	Viewed architecture and buildings	33%
4	Hill walk, mountaineering, hike or ramble - guided or self-guided	31%
5	A country park or garden	28%
Base: Took part in activities/attractions in Aberdeenshire		152

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 Aberdeenshire

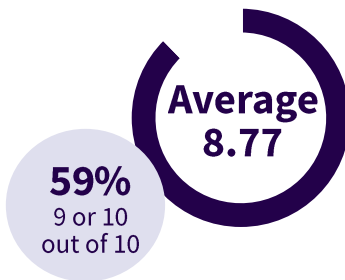
Satisfaction with... (Scored out of 10)

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 Aberdeenshire excluding n/a 139 - 147

Food and drink experiences in Aberdeenshire



31% took part in food and/or drink experiences in Aberdeenshire

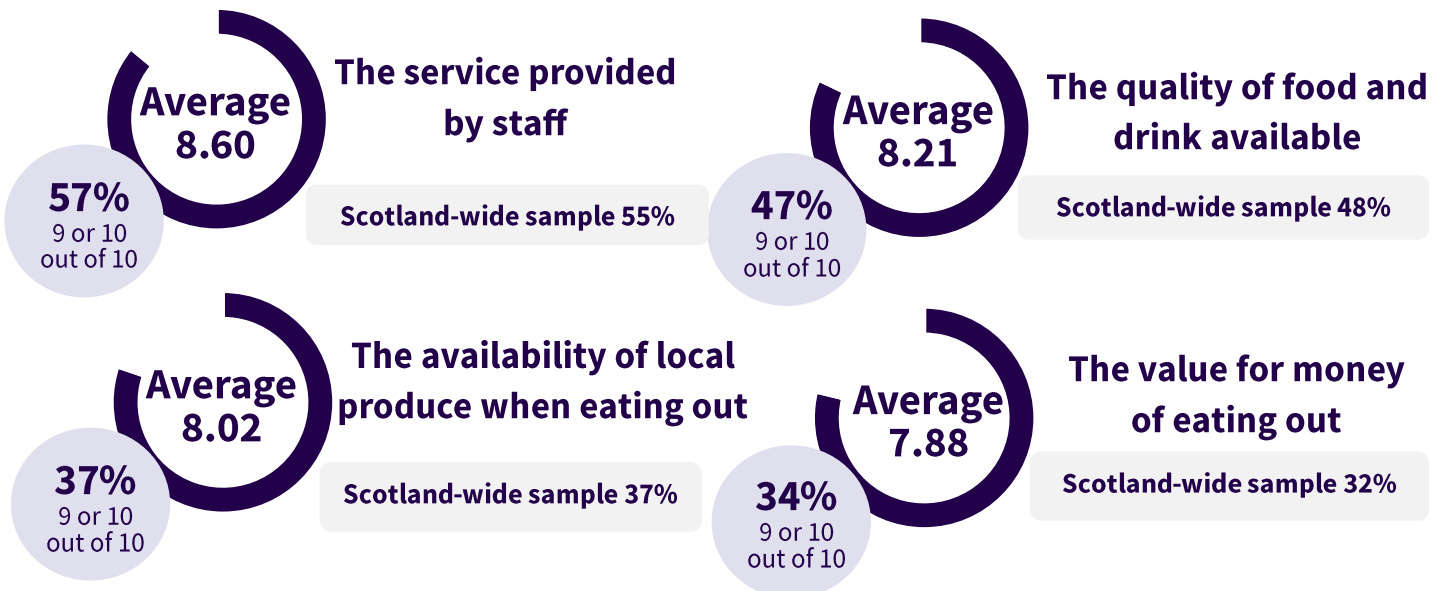
Key food and drink experiences included:

- 16% visited a farm shop/farmers market
- 11% visited a fine dining restaurant
- 3% took part in food or drink event or festival

Base: Stage 2 Took part in activities/attractions in Aberdeenshire 152

Satisfaction with food and drink experiences in Aberdeenshire

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



Base: Stage 2 Aberdeenshire visitors excl. n/a 215-227

Overall experience and likelihood to recommend Aberdeenshire

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



74% Aberdeenshire

71% for Scotland overall
(Scotland-wide sample)

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



77% Aberdeenshire

82% for Scotland overall
(Scotland-wide sample)

Base: Stage 2 Aberdeenshire visitors (priority region) 153

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 233 is used this includes all visitors who stayed in Aberdeenshire during their trip. Where the base size is 153 this shows results for the visitors who were allocated Aberdeenshire 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: Aberdeenshire (e.g. Ballater, Braemar)
- 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) on visitscotland.org for more information on this survey.

Disclaimer:

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.

Contact Us:

Insight Department

VisitScotland

visitscotland.org **visitscotland.com**

research@visitscotland.com

If you require any of this information in an alternative format please let us know.