

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, **177** overnight visitors to the Outer Hebrides completed the online survey. The results shown below are based on these visitors to the Outer Hebrides.

Profile of overnight visitors to Outer Hebrides



66% Domestic visitors

26% Scotland (residents)
40% Rest of UK



34% International visitors

16% Europe
18% Long haul including:
10%: North America
7%: Australasia

Base: Stage 2 online survey Outer Hebrides visitors 177



Average number in travel party: 2.5

Children (under 16) in party: 11%

Base: Stage 2 online survey Outer Hebrides visitors 177

Life Stage

Pre-nesters	11%
Families	10%
Older Independents	44%
Retirement Age	34%

Base: Stage 2 online survey Outer Hebrides visitors excl. n/a 174

Profile of trip



Outer Hebrides visitors stayed on average: 12.6 nights in total in Scotland including 6.0 nights in the Outer Hebrides

Base: Stage 2 online survey Outer Hebrides visitors 177



76% of visitors to the Outer Hebrides toured around Scotland, staying in two or more places



First time visitor: 22%
Repeat visitor: 78%

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

Base: Stage 2 online survey Outer Hebrides visitors 177

Examples of Type of Trip

A trip of a lifetime: 8%
A special holiday/short break: 17%

Base: Stage 2 online survey Outer Hebrides visitors excl. Scotland residents 144

Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Outer Hebrides sample
1	The scenery and landscape	86%
2	The history and culture	56%
3	Outdoor activities available	43%
4	Visiting friends or family	26%
5	Scotland's people	22%
6	A Scottish attraction	18%
7	Scotland's food and drink	18%
8	My or my family's Scottish ancestry	18%
9	It's easy to get to or close to home	12%
10	A particular experience found in Scotland	11%
Base: All visitors to the Outer Hebrides (stage 2 online survey)		177

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 online survey)		3,011

Type of accommodation used in the Outer Hebrides

43% stayed in serviced accommodation



24%

Hotel, motel, inn



22%

Guest house, B&B



4%

Hostel

Base: Stage 2 online survey Outer Hebrides visitors (priority region) 164

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

69% stayed in non-serviced accommodation



34%

Self-catering/
commercial non-
serviced rentals



31%

Camping,
caravan,
motorhome

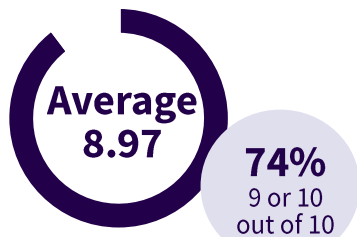


10%

Friend or
relative's home

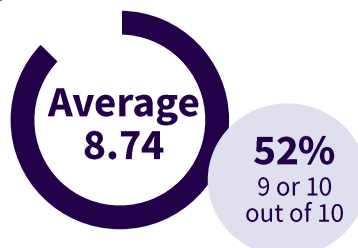
Satisfaction with accommodation in the Outer Hebrides

Satisfaction with... (Scored out of 10)



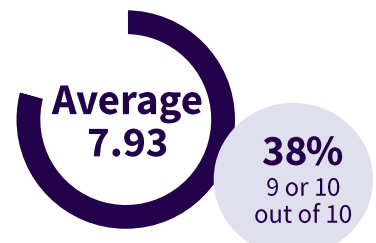
Overall welcome provided to you

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



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

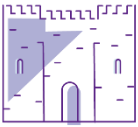
Scotland-wide sample - 53%
(9 or 10 out of 10)



The value for money of accommodation

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

Attractions and activities undertaken in the Outer Hebrides



Top 5 attractions or activities undertaken/visited in the Outer Hebrides

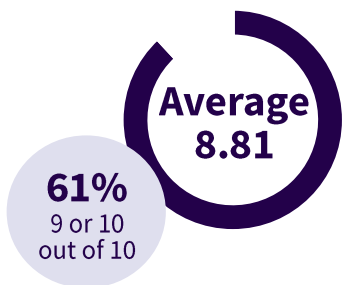
Rank	Attractions and activities undertaken in the Outer Hebrides	Outer Hebrides sample
1	An archaeological site	58%
2	A visitor or heritage centre	54%
3	Hill walk, mountaineering, hike or ramble	46%
4	A castle or fort	39%
5	A museum or art gallery	36%
Base: Took part in activities/attractions in the Outer Hebrides		164

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 the Outer Hebrides

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions



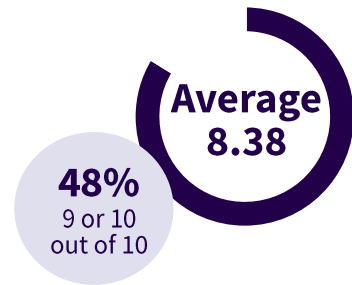
Scotland-wide sample - 64% (9 or 10 out of 10)

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 the Outer Hebrides excl. n/a 153-157

Food and drink experiences in the Outer Hebrides



28% took part in food and/or drink experiences in the Outer Hebrides

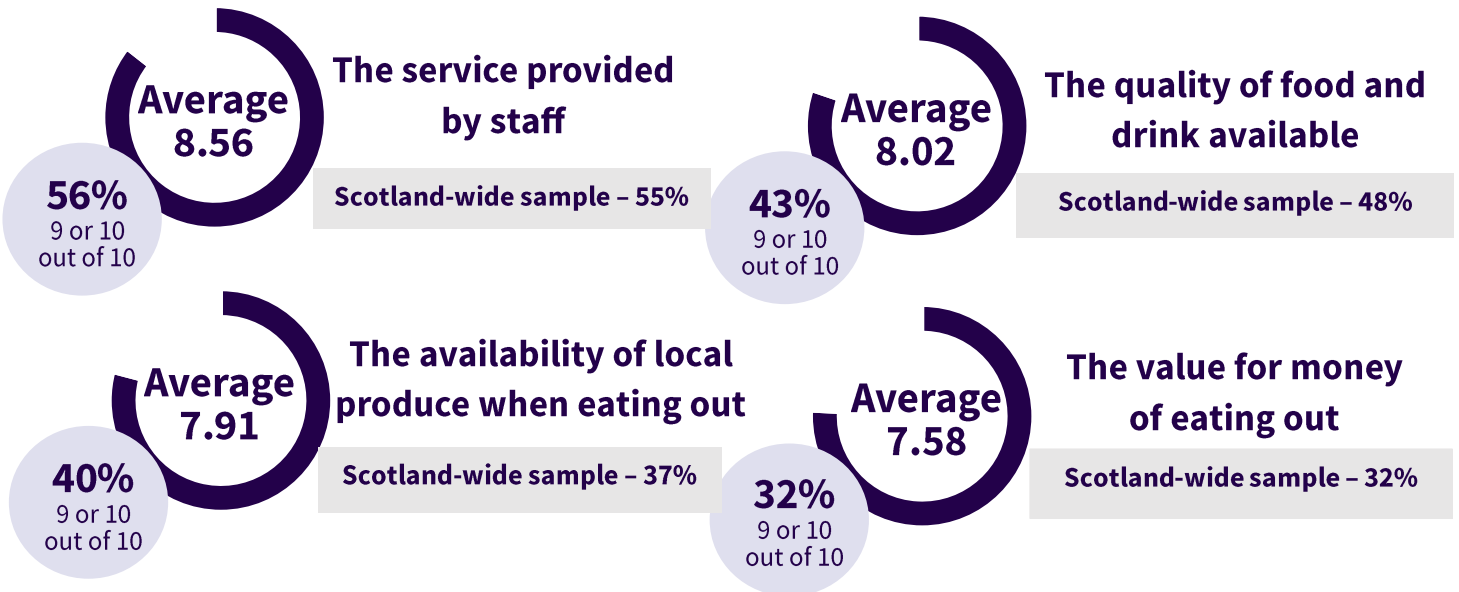
Key food and drink experiences included:

- 14% visited a farm shop/farmers market
- 11% visited a fine dining restaurant
- 2% undertook a food or drink activity e.g. cookery class

Base: Stage 2 online survey: Took part in activities/attractions in the Outer Hebrides 164

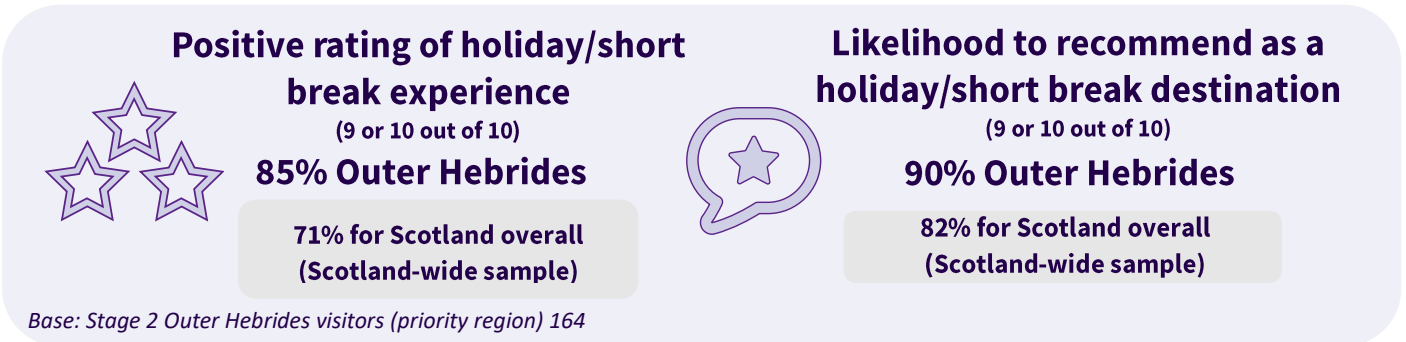
Satisfaction with food and drink experiences in the Outer Hebrides

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



Base: Stage 2 Outer Hebrides visitors excl. n/a 169-173

Overall experience and likelihood to recommend the Outer Hebrides



Base: Stage 2 Outer Hebrides visitors (priority region) 164

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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 177 is used this includes all visitors who stayed in the Outer Hebrides during their trip. Where the base size is 164 this shows results for the visitors who were allocated the Outer Hebrides as their priority region.
- 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.
- 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.

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