SCOTLAND VISITOR SURVEY 2023

RESPONSIBLE TOURISM

1. How satisfied were visitors with the sustainable practices they saw in Scotland?

2. What were visitor attitudes towards the impact of tourism on communities, litter and graffiti, overcrowding in natural areas and volume of people?

3. How many visitors used accommodation with green accreditation?

4. How many visitors used electric cars or public transport during their trip in Scotland?

October 2024

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progressive

Contents

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

135 sampling points across Scotland

11,572 face to face interviews

3,011 online surveys

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

Key Insights

It is vital that we build Scotland's economy in a responsible and inclusive way. At the focus of responsible tourism is a collaborative approach to ensure we grow the value of tourism in a way that maximises the positive benefits of tourism for everyone.

33% of visitors to Scotland were encouraged to behave in a responsible way when here and 26% were very satisfied with the environmental practices they saw.

However, we are aware that sustainability and responsible travel are not always front of mind for consumers taking a holiday or short break and this may affect how they respond to these questions.

It is vital that the industry showcases what environmental practices have been put in place to visitors and how measures can make a difference.

1.0 Satisfaction with environmental practices in Scotland

26% of visitors were very satisfied with the practices they saw in Scotland
(scoring 9 or 10 on a 10 point scale)

65% were satisfied to some extent (scoring 7 and above)

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1.1 Satisfaction with environmental practices in Scotland

Just over a quarter of visitors were very satisfied with the environmental practices they saw when on holiday in Scotland in 2023. 15% were unsure (a higher proportion than other questions).

Other research tells us that consumers may be reluctant to think of sustainability whilst on their holidays. There may be a number of factors influencing the 15% unsure; a lack of interest in environmental practices when on holiday here or a lack of awareness.

To reduce the proportion of unsure and boost the top satisfaction rankings, it is vital that the industry showcases the environmental practices that have been put in place to visitors and show how these can make a difference.

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Read the conscious traveller trend within our Trends publication on visitscotland.org

26%

of visitors were very satisfied with the practices they saw in Scotland (scoring 9 or 10 on a 10 point scale)
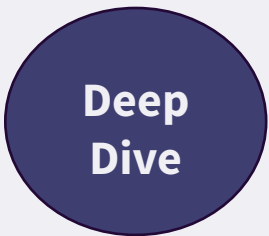
24% UK visitors
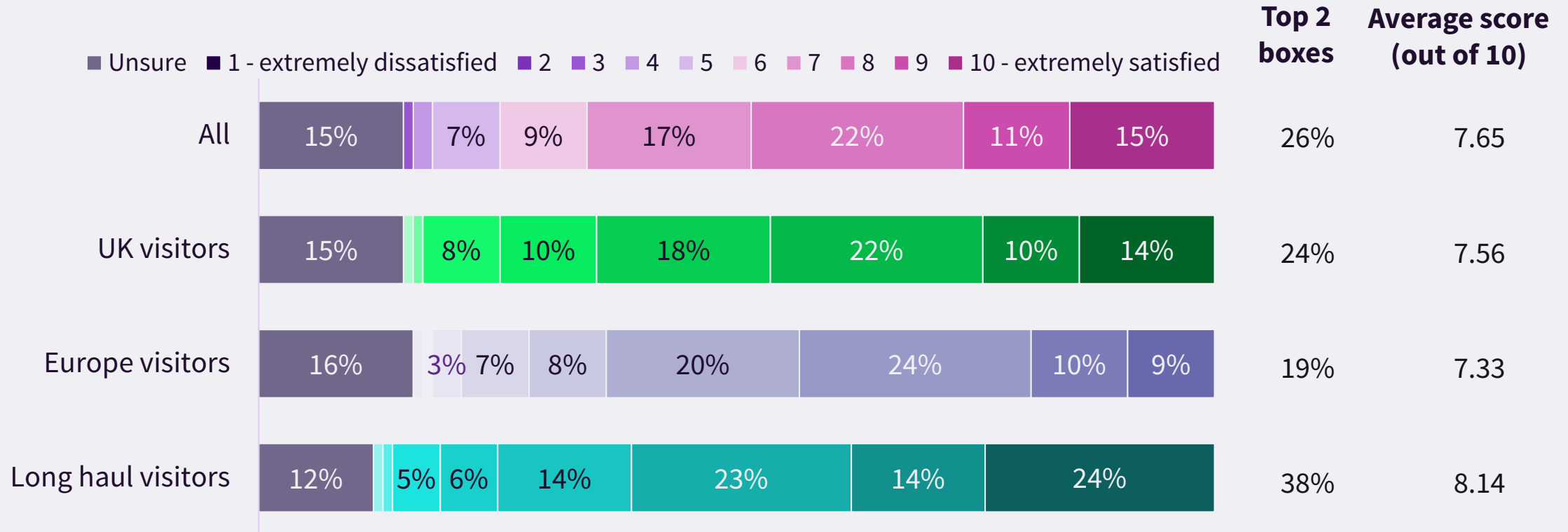
19% European visitors

38% Long haul visitors

Visitors from USA were the most positive.

1.2 Satisfaction with sustainable and environmental practices

The majority of visitors were satisfied with the sustainable practices they saw on their trip, although only a quarter provided a high 9 or 10 score. Long haul visitors were the most satisfied and Europe visitors were the least satisfied.

Legend: Unsure | 1 - extremely dissatisfied | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 - extremely satisfied

	Unsure	4	5	7	8	9	10	Top 2 boxes	Average score (out of 10)
All	15%	7%	9%	17%	22%	11%	15%	26%	7.65
UK visitors	15%	8%	10%	18%	22%	10%	14%	24%	7.56
Europe visitors	16%	3% 7%	8%	20%	24%	10%	9%	19%	7.33
Long haul visitors	12%	5% 6%	14%	23%	14%	24%		38%	8.14

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2.0 Visitor attitudes: impact of tourism on local communities

41%

of visitors strongly agreed that:

"tourism in Scotland has a positive impact on local communities"

(scoring 9 or 10 on a 10 point scale)

76%

of visitors agreed to some extent that:

"tourism in Scotland has a positive impact on local communities"

(scoring 7 to 10 on a 10 point scale)

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Scotland residents on holiday in Scotland were particularly positive. 46% strongly agreed that tourism has a positive impact on local communities.

Visitors from the USA were the most positive (51%)

2.1 Visitor attitudes: impact of tourism on local communities

41%

of visitors strongly agreed that:

"tourism in Scotland has a positive impact on local communities"

(scoring 9 or 10 on a 10 point scale)

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UK visitors	**41%**
Europe visitors	**27%**
Long haul visitors	**47%**

2.2 Visitor attitudes: litter and graffiti

47% of visitors strongly agreed that:

"the environment was clean and clear of litter, graffiti"

(scoring 9 or 10 on a 10 point scale)

84% of visitors agreed to some extent that:

"the environment was clean and clear of litter, graffiti"

(scoring 7 to 10 on a 10 point scale)

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Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

Base (All, excluding 'not applicable'): 2,858 – 3,001

2.3 Visitor attitudes: litter and graffiti

47%

of visitors strongly agreed that:

"the environment was clean and clear of litter, graffiti"

(scoring 9 or 10 on a 10 point scale)

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UK visitors **45%**

Europe visitors **46%**

Long haul visitors **56%**

Base (all UK visitors): 1,531

2.4 Visitor attitudes: encouraged to behave in an environmentally responsible way

33%

of visitors agreed that:

"while on holiday in Scotland I was encouraged to behave in an environmentally responsible way"

(scoring 9 or 10 on a 10 point scale)

64%

of visitors agreed to some extent that:

"while on holiday in Scotland I was encouraged to behave in an environmentally responsible way"

(scoring 7 to 10 on a 10 point scale)

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Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

This statement was the least positive of the 3 visitor attitude statements.

This highlights the need to communicate clearly to visitors the environmental practices put in place by businesses and how individual actions can have an impact.

We are encouraging all visitors to plan and enjoy a responsible trip in Scotland via the responsible tourism promise on visitscotland.com

Base (All, excluding 'not applicable'): 2,858 – 3,001

2.5 Visitor attitudes: encouraged to behave in an environmentally responsible way

33%

of visitors strongly agreed that:

"while on holiday in Scotland I was encouraged to behave in an environmentally responsible way"

(scoring 9 or 10 on a 10 point scale)

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|	
UK visitors	32%
Europe visitors	27%
Long haul visitors	40%

Base (all UK visitors): 1,531

2.6 Attitudes towards sustainable tourism

Deep Dive

Visitors were generally positive about sustainable tourism in Scotland, although scores were moderate rather than high. Most agreed that tourism has a positive impact on communities and the environment was clean and clear of litter, although agreement was somewhat lower for being encouraged to behave in an environmentally responsible way.

Legend: ■ Unsure ■ 1 - disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 - agree strongly

		Top 2 boxes	Ave. score (out of 10)
Tourism in Scotland has a positive impact on local communities	14% / 4% / 5% / 13% / 22% / 14% / 27%	41%	8.28
The environment was clean and clear of litter, graffiti, etc.	5% / 6% / 13% / 24% / 18% / 29%	47%	8.11
While on holiday in Scotland I was encouraged to behave in an environmentally responsible way	8% / 4% / 3% / 9% / 9% / 11% / 19% / 13% / 21%	33%	7.37
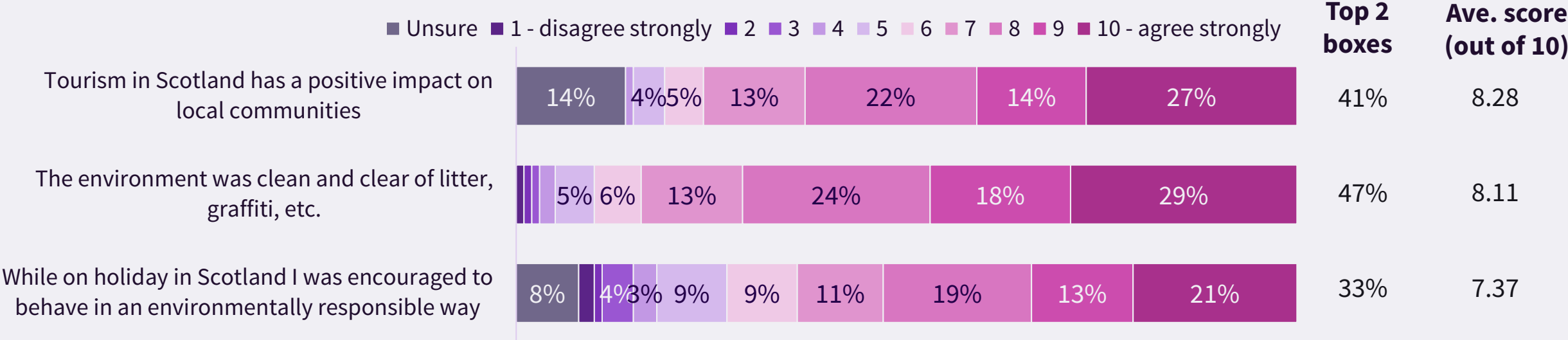
Long haul visitors tended to be the most positive about sustainable tourism in Scotland, while Europe visitors were the least positive.
Retirement age visitors were the most likely to agree that tourism in Scotland has a positive impact on communities (mean 8.40; 45% top 2 boxes). Pre-nesters were the most likely to note that they had been encouraged to behave in an environmentally responsible way (mean 7.61; 40% top 2 boxes).

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Base (All, excluding 'not applicable'): 2,858 – 3,001
Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

2.7 Visitor attitudes: overcrowding at natural areas

40%

of visitors strongly DISAGREED that:

"the natural areas I visited were often overcrowded with people"

(scoring 1 or 2 on a 10 point scale)

68%

of visitors DISAGREED to some extent that:

"the natural areas I visited were often overcrowded with people"

(scoring 1 to 4 on a 10 point scale)

The majority of visitors did not express concern regarding overcrowding. 5% did strongly agree that natural areas were overcrowded.

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Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

Base (All, excluding 'not applicable'): 2,858 – 3,001

2.8 Visitor attitudes: overcrowding at natural areas

40%

of visitors strongly disagreed that:

"the natural areas I visited were often overcrowded with people"

(scoring 1 or 2 on a 10 point scale)

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UK visitors	45%
Europe visitors	29%
Long haul visitors	30%

Base (all UK visitors): 1,531

2.9 Visitor attitudes: impact of volume of people on the environment

25% of visitors strongly DISAGREED that:

"the volume of people visiting natural areas , such as countryside, beaches and forests, had a negative impact on the environment"

(scoring 1 or 2 on a 10 point scale)

46% of visitors strongly DISAGREED that:

"the volume of people visiting natural areas , such as countryside, beaches and forests, had a negative impact on the environment"

(scoring 1 or 4 on a 10 point scale)

7% did strongly agree that the volume of people has a negative impact on the environment (scoring 9 or 10)

Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

Base (All, excluding 'not applicable'): 2,858 – 3,001

2.10 Visitor attitudes: impact of volume of people on the environment

25%

of visitors strongly DISAGREED that:

"the volume of people visiting natural areas , such as countryside, beaches and forests, had a negative impact on the environment"

(scoring 1 or 2 on a 10 point scale)

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UK visitors	26%
Europe visitors	16%
Long haul visitors	25%

Base (all UK visitors): 1,531

2.11 Attitudes towards visitor volume

Deep Dive

Although the majority of visitors disagreed that they were concerned about the volume of people in natural areas, significant minorities did express some concern. Almost three in ten (29%) agreed that the volume of people had a negative impact on the environment, while two in ten (21%) agreed the natural areas visited were overcrowded.

Legend: ■ Unsure ■ 1 - disagree strongly ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 - agree strongly

	Bottom 2 boxes (strong disagree)	Ave. score (out of 10)*
The natural areas I visited were often overcrowded with people	40%	3.58
The volume of people visiting natural areas had a negative impact on the environment	25%	4.48

The natural areas I visited were often overcrowded with people: 28% | 12% | 16% | 12% | 9% | 6% | 6% | 5% | 2% | 3%

The volume of people visiting natural areas had a negative impact on the environment: 11% | 16% | 8% | 12% | 10% | 13% | 7% | 8% | 7% | 3% | 4%

*Lower score = positive finding (negative statement)

UK visitors were more likely to disagree that natural areas were often overcrowded (45% bottom 2 boxes) than those from Europe (29%) or long haul countries (30%). Visitors from Europe were less likely to disagree the volume of people had a negative impact (16% bottom 2 boxes) than those from the UK (26%) or long haul countries (25%).

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Base (All, excluding 'not applicable'): 2,858 – 2,869
Q62 (Stage 2): To what extent do you agree or disagree with the following statements about your recent holiday or short break in Scotland?

3.0 Accommodation: environmental accreditation

Only a small proportion of visitors (6%) actively looked for accommodation with green/environmental accreditation.

However, 11% noted that they stayed in accommodation that had green/environmental credentials.

Visitors from Europe (13%) and long haul markets (19%) were more likely to have stayed in accommodation with green accreditation than those from the UK (8%). However, these differences are likely to be driven by the higher proportions of these markets staying in hotels, where accreditation is more common.

3.1 Environmentally accredited accommodation

6%

specifically looked for accommodation with green/environmental accreditation

11%

stayed in accommodation with green/environmental accreditation

- The proportion looking for green accredited accommodation was consistent across markets: UK (5%), Europe (8%), long haul (6%)

- Visitors from Europe (13%) and long haul markets (19%) were more likely to have stayed in accommodation with green accreditation than those from the UK (8%).

- Higher proportions of first time visitors (14% vs. 10% repeat visitors) and those on the trip of a lifetime (18%, vs not 11%) stayed in environmentally accredited accommodation.

- These differences are likely to be driven by the higher proportions of these sub-groups staying in hotels, where accreditation is more common.

- There was also a great likelihood amongst those staying in rural areas (11%) or touring (14%), compared to those staying in urban areas (7%).

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Base (stayed in paid accommodation): 2,761

Q33 (Stage 2): Did you specifically look for accommodation in Scotland that had green or environmental accreditation when booking?; Q34 (Stage 2): Did any of the accommodation you stayed in in Scotland have green or environmental accreditation?

4.0 Travel within Scotland

Car travel still dominates travel around Scotland but there is a significant proportion who are using public transport. This is higher for those travelling within an urban location (or as part of touring around Scotland) compared with those staying more in rural or coastal locations.

In 2023, the majority of visitors who were using a car were using a petrol or diesel vehicle (84%). Although 12% were using hybrid vehicles, only 2% were driving pure electric vehicles for travelling around Scotland.

Satisfaction with electric vehicle charging infrastructure was lower than for other aspects with a satisfaction score.

Even if electric hire cars had been available, only a fifth of visitors (who hired a car) stated they would want to hire electric.

There are also differences by life stage with pre-nesters more likely to travel by public transport driven by environmental concerns, cost and not having access to a car.
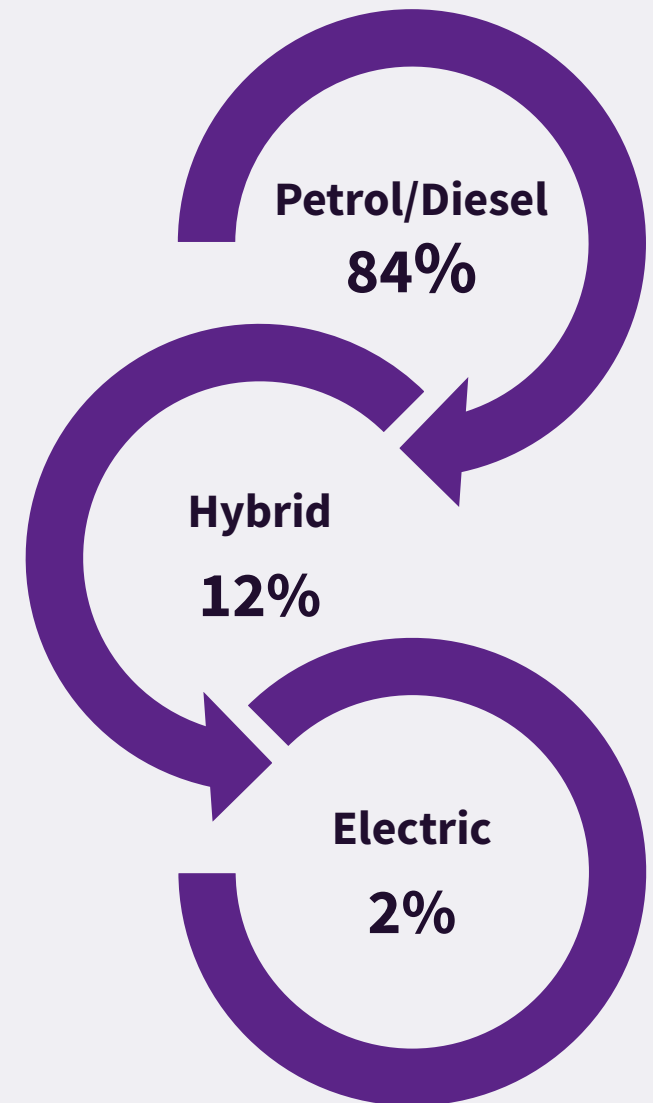
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4.1 Travel within Scotland

Own car or friend or family member's car — 52%
Walking — 33%
Train — 25%
Public bus or coach — 24%
Hire car — 17%
Boat, ship or ferry — 17%
Organised coach tour — 11%
Taxi — 11%
Tram — 8%
Motorhome or campervan — 7%
Plane within Scotland — 3%
Bicycle — 3%
Motorcycle or motorbike — 1%
Electric bike — 1%
Other — 1%

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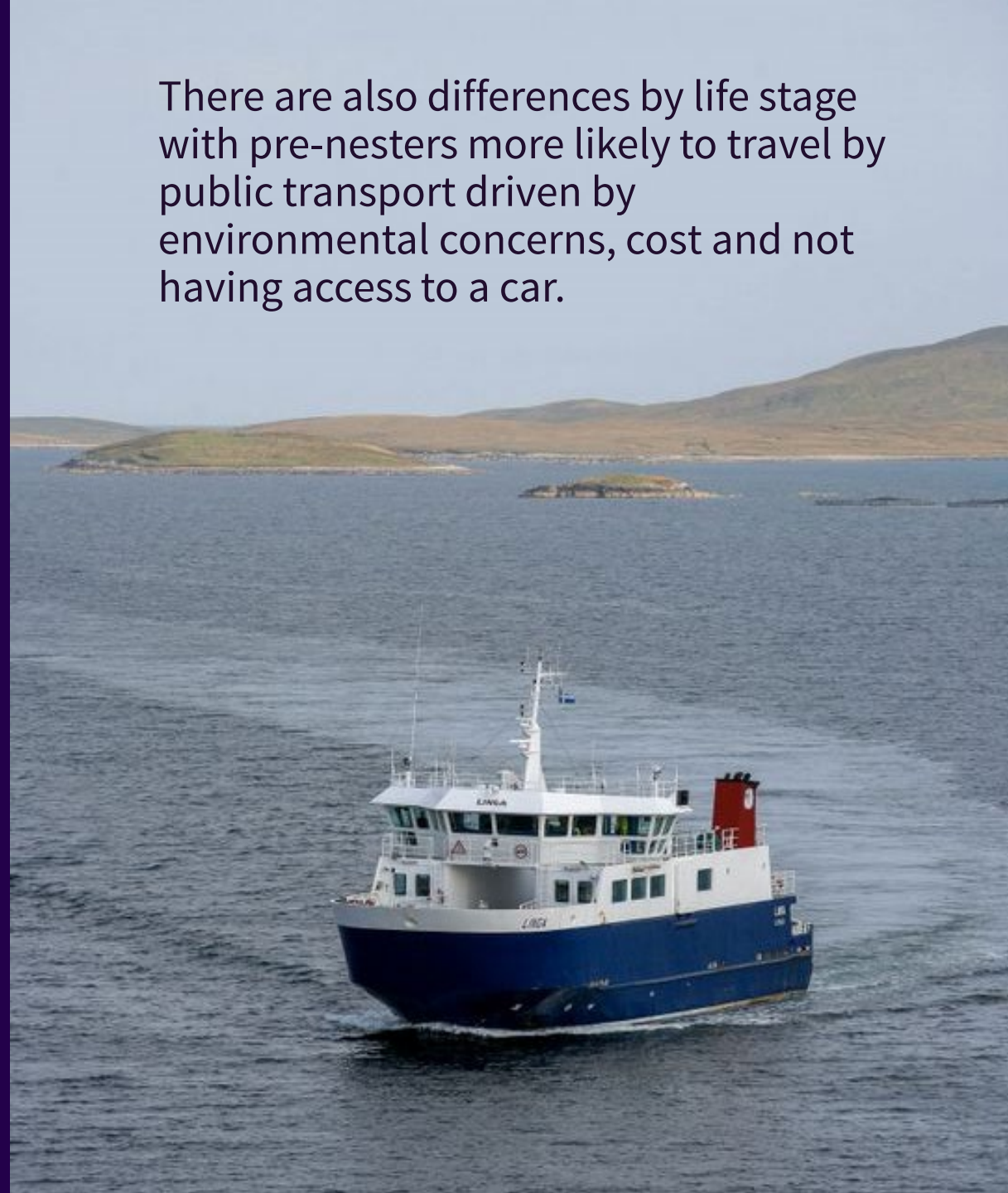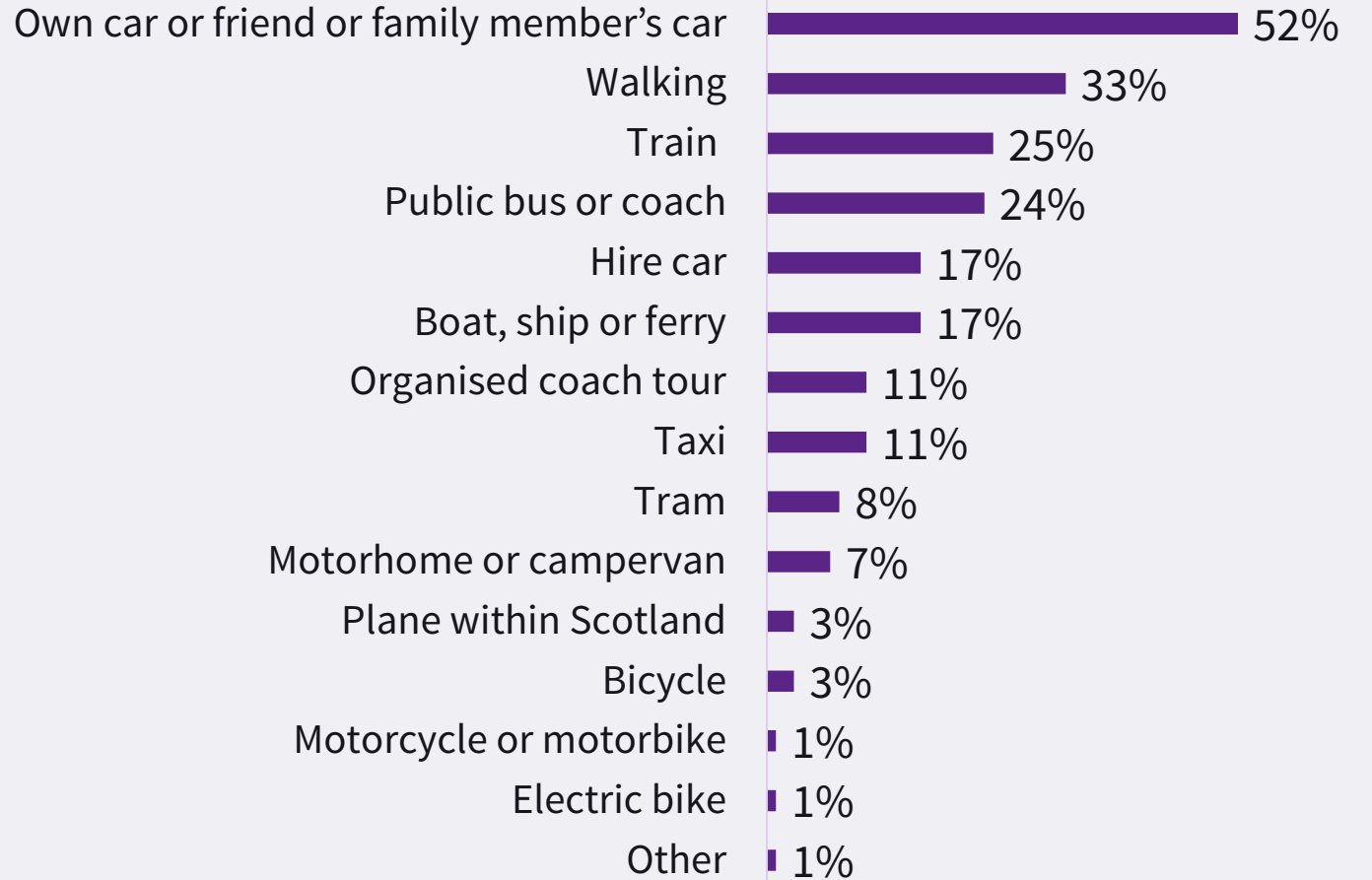
4.2 Type of car used

69% of all visitors used a car on their trip in Scotland in 2023 (own car or hire car)

Petrol/Diesel
84%

Hybrid
12%

Electric
2%

Q37 (Stage 2): What type of car did you use?

Base (Q36 - All): 3,011
Base (Q37 – all who travelled by car): 2,083

4.3 Satisfaction with electric charging points

The small minority of people who drove an electric car during their trip were generally moderately satisfied with charging infrastructure. On average, the availability and reliability of charging points in Scotland was scored 7 out of 10.

■ 1 - extremely dissatisfied ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 - extremely satisfied

Top 2 boxes   **Average score (out of 10)**

| Reliability of electric charging points | 7% | 7% | 3% | 2% | 12% | 13% | 10% | 5% | 8% | 30% | **38%** | **6.80** |

| Availability of electric charging points | 6% | 7% | 3% | 16% | 11% | 10% | 16% | 7% | 20% | **27%** | **6.60** |

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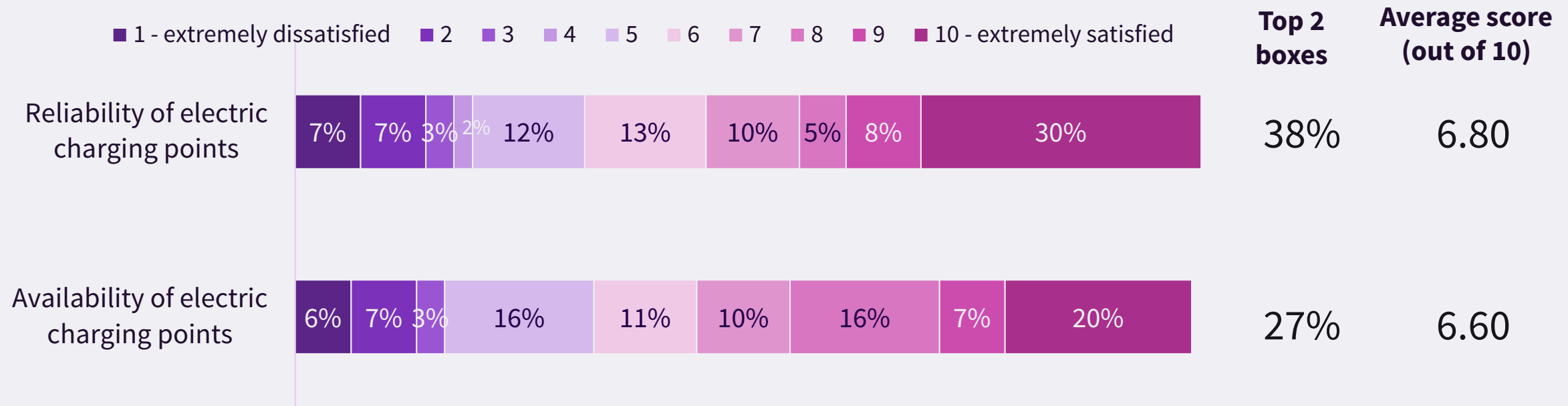
4.4 Likelihood to hire an electric car if one had been available

Visitors who had hired a petrol or diesel car were asked if they would have chosen an electric car, if one had been available. Only one in five said that they would have likely selected an electric car, with a third saying this would have been very unlikely.
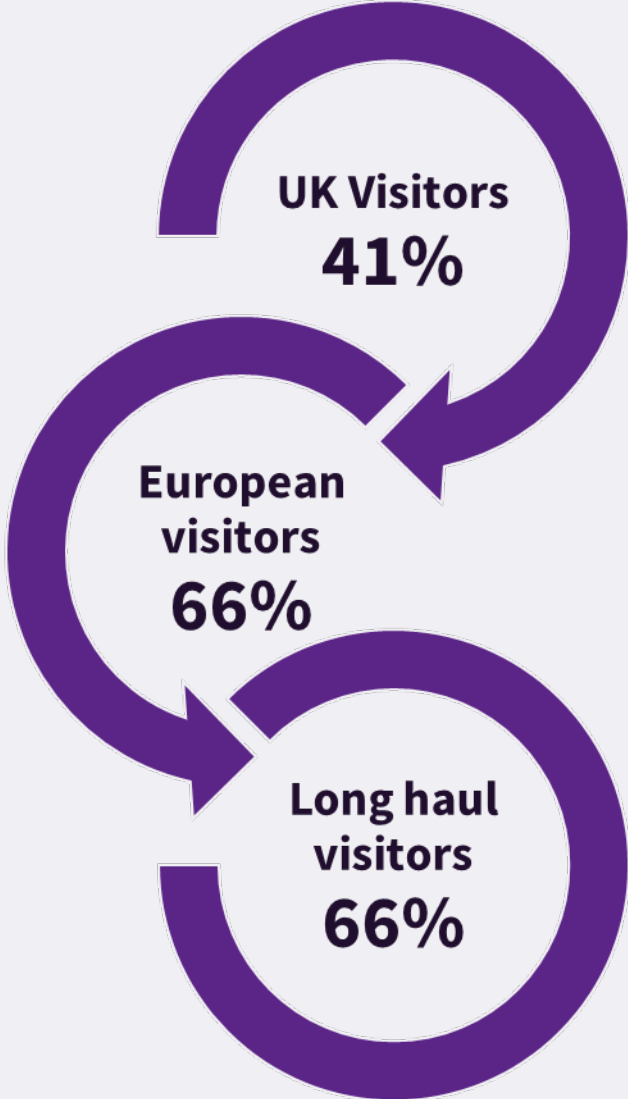

Bar chart:
- Very likely: 9%
- Quite likely: 11%
- Neither nor: 21%
- Quite unlikely: 18%
- Very unlikely: 33%
- Unsure: 8%
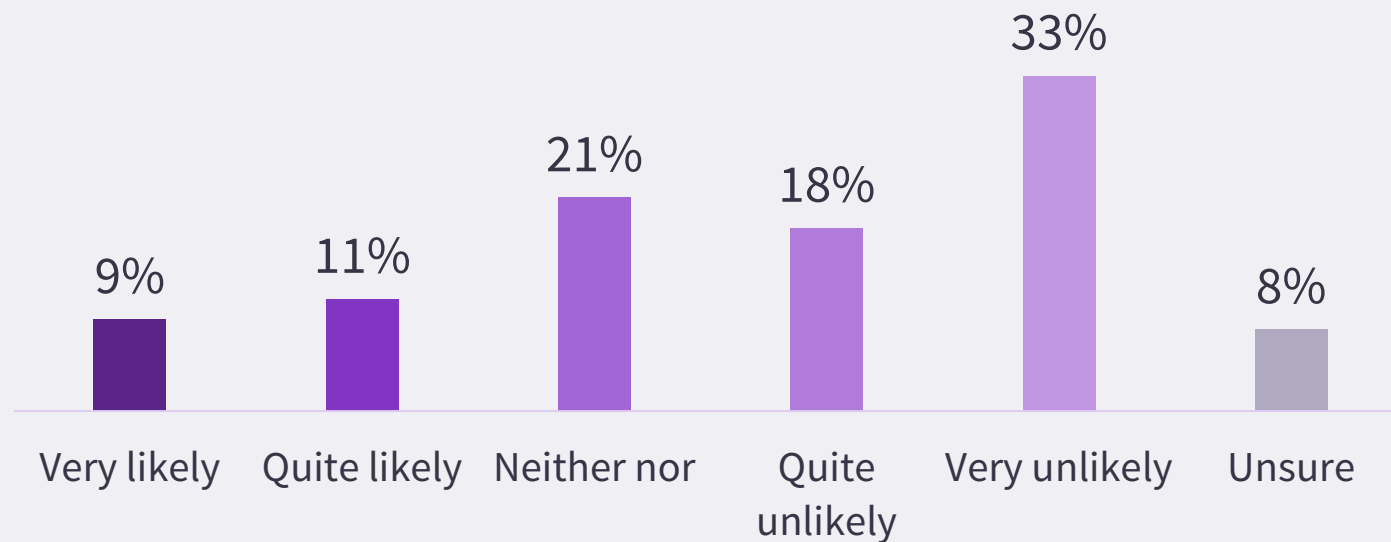
- Findings did not vary by market (UK, Europe, long haul)

- Families were more likely to consider an electric hire car (32% likely) than other life stage groups.

4.5 Use of Public Transport
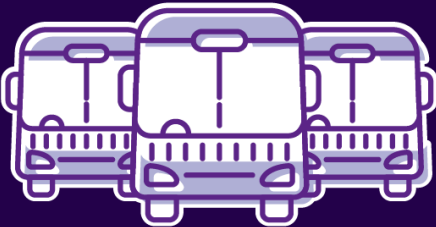
49% of all visitors said they used public transport on their trip in Scotland

UK Visitors
41%

European visitors
66%

Long haul visitors
66%

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Q36(Stage 2): What types of transport did you use for your holiday or short break **while you were in Scotland**

Base (all): 3,011

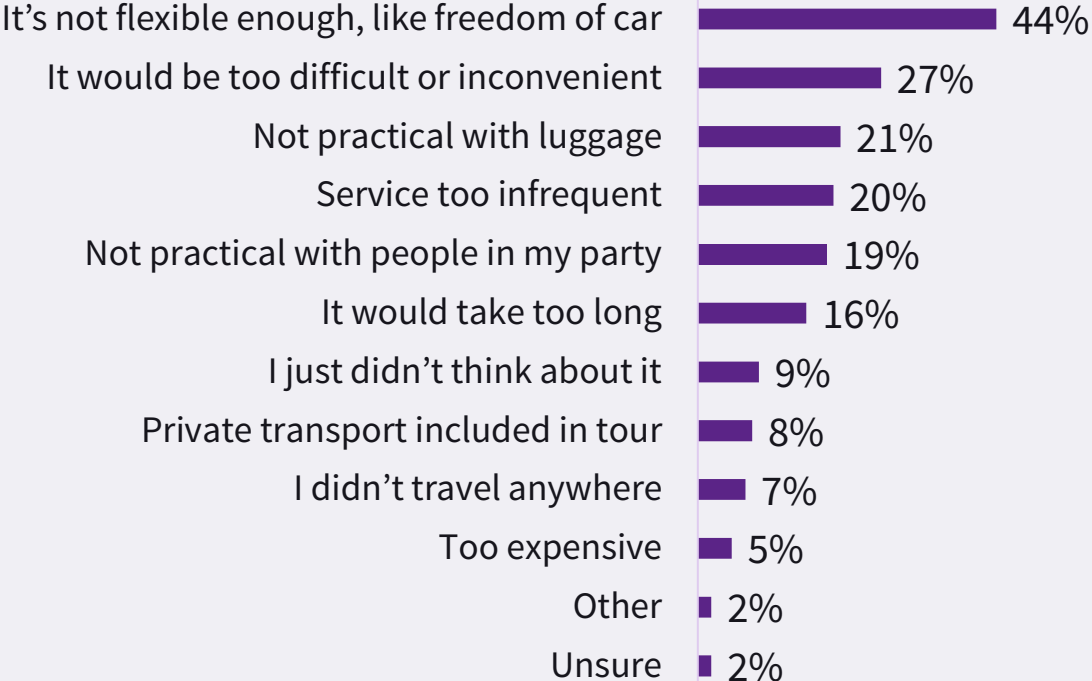# 4.6 Public Transport: UK and Long Haul Markets

UK Visitors 41%

Long haul visitors 66%

Rest of UK: 43%

Scotland: 35%

USA: 64%

Canada: 77%

Australasia: 63%

Q36(Stage 2): What types of transport did you use for your holiday or short break **while you were in Scotland**

4.7 Public Transport: European Markets

European Visitors **66%**

Germany: 68%

France: 62%

Netherlands: 68%

Spain/Italy: 59%

Technical note: the overall Europe figure is weighted (and can be compared to UK and long haul figures) but individual European markets are unweighted due to sample sizes

Q36(Stage 2): What types of transport did you use for your holiday or short break **while you were in Scotland**

4.8 Reasons for and against choosing public transport

The key motivations for using public transport were ease of getting to the destination and cost, with over a quarter mentioning being environmental. The main barriers were flexibility, convenience and practicality concerns.

Reasons for choosing public transport

Easier to get to places	52%
More cost effective	35%
More environmentally friendly	27%
To enhance my holiday experience	27%
I can't drive or don't have access to a car	12%
I don't like driving in other countries	10%
Ferry required for access	6%
To meet local people	5%
Other	8%
Unsure	2%
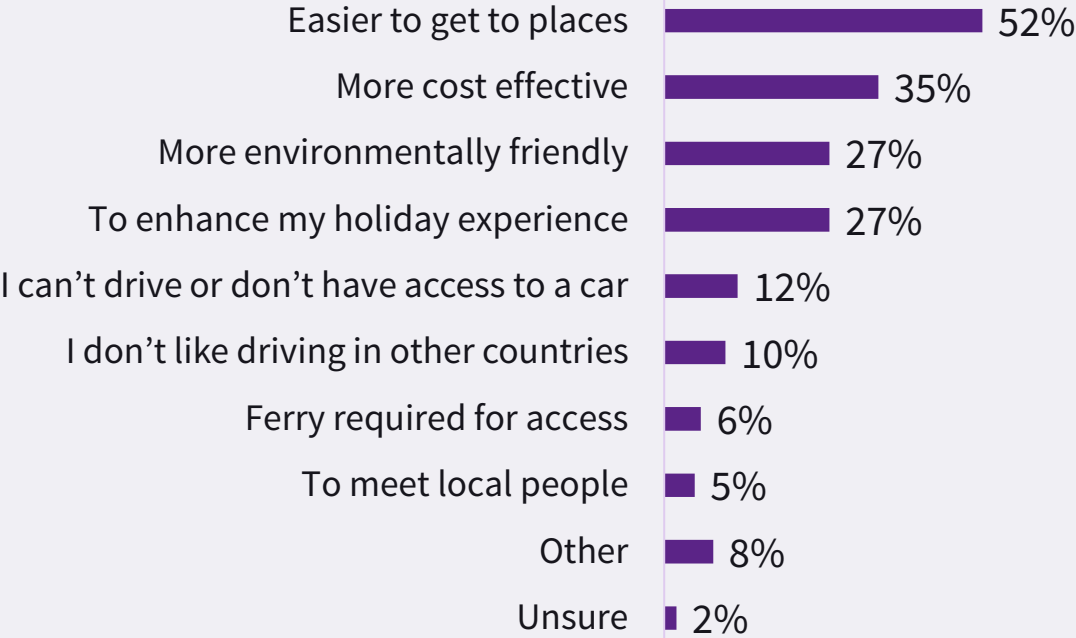
Reasons for not choosing public transport

It's not flexible enough, like freedom of car	44%
It would be too difficult or inconvenient	27%
Not practical with luggage	21%
Service too infrequent	20%
Not practical with people in my party	19%
It would take too long	16%
I just didn't think about it	9%
Private transport included in tour	8%
I didn't travel anywhere	7%
Too expensive	5%
Other	2%
Unsure	2%

Pre-nesters were generally more likely to be motivated by the environment (35%), cost (48%) and not having a car (27%) than other life stage groups.

Base (Q40 – All who used public transport): 1,517; Base (Q41 – all who did not use public transport): 1,485
Q40 (Stage 2): What were your reasons for choosing to use public transport?; Q41 (Stage 2): What were your reasons for not choosing to use public transport?
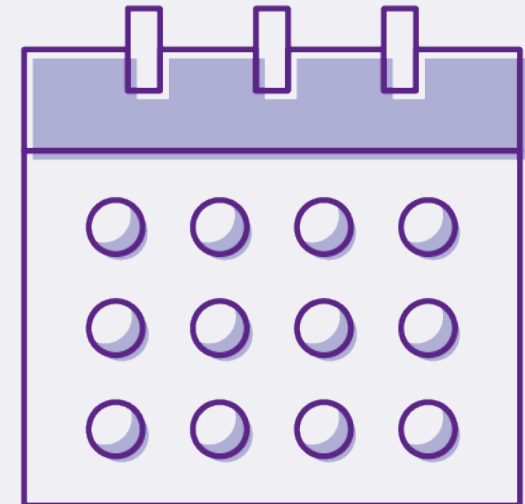
5. Definitions used within this report

- 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

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October 2024