

SCOTLAND VISITOR SURVEY 2023

ATTRACTIONS, ACTIVITIES AND EVENTS

SUMMARY(8 SLIDES)

September 2024

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 its regions



1. Key insights

What calls people to holiday in Scotland is a personal choice and can be diverse and varied.

We see how engagement with attractions, activities and events can be influenced by a range of factors.

Scotland's iconic scenery and landscape and the richness of our history and culture remain as the top motivators for choosing Scotland for a holiday or short break.

Visiting attractions, taking part in events and activities are central to connecting people to our legends and stories which brings history and geography to life. These aspects of the visitor experience also allow visitors to connect with Scotland's people which helps to create an emotional connection for visitors.

Although attractions, activities and events are central to the visitor experience, there are small nuances across markets which may help destinations or businesses identify marketing opportunities to captivate different visitor types.

To read the full analysis, including market break down, browse the [Scotland Visitor Survey 2023: Attractions, Activities and Events full PDF document](#).



2. Attractions, Activities and Events

96%

of all visitors to Scotland visited at least one type of attraction

89%

of all visitors participated in at least one type of activity

46%

of all visitors took part in at least one food and drink experience

28%

of all visitors participated in at least one type of event

Interpretation note: focus on overnight visitors to Scotland only. Fieldwork did not take place at any specific events which would significantly skew results, particularly at a regional level.



3. Long haul visitors

Overseas visitors are typically hungry for a combination of experiences on any international break and may have a higher interest in cultural activities than the domestic market (who may feel they know Scotland's culture well).


We see a clear pattern that our long haul visitors are immersing themselves in our history and culture through attractions, activities and events (more so than other markets).

They are more likely to visit heritage centres, archaeological sites, a UNESCO site, view architecture, go shopping, go on guided tours and trace ancestors than other markets. As many may be first time visitors to Scotland (61%) they may be experiencing this for the first time.

They are less likely to be looking for rest and relaxation than closer to home visitors.

Long haul visitors are also more likely to book activities and experiences in advance of arrival (63%).

- 100%** visited at least one type of attraction
- 96%** participated in at least one type of activity
- 62%** took part in at least one food and drink experience
- 38%** participated in at least one type of event

A person in a green jacket stands on a grassy dune, looking out over a wide beach and the ocean under a clear blue sky.

100% visited at least one type of attraction

91% participated in at least one type of activity

44% took part in at least one food and drink experience

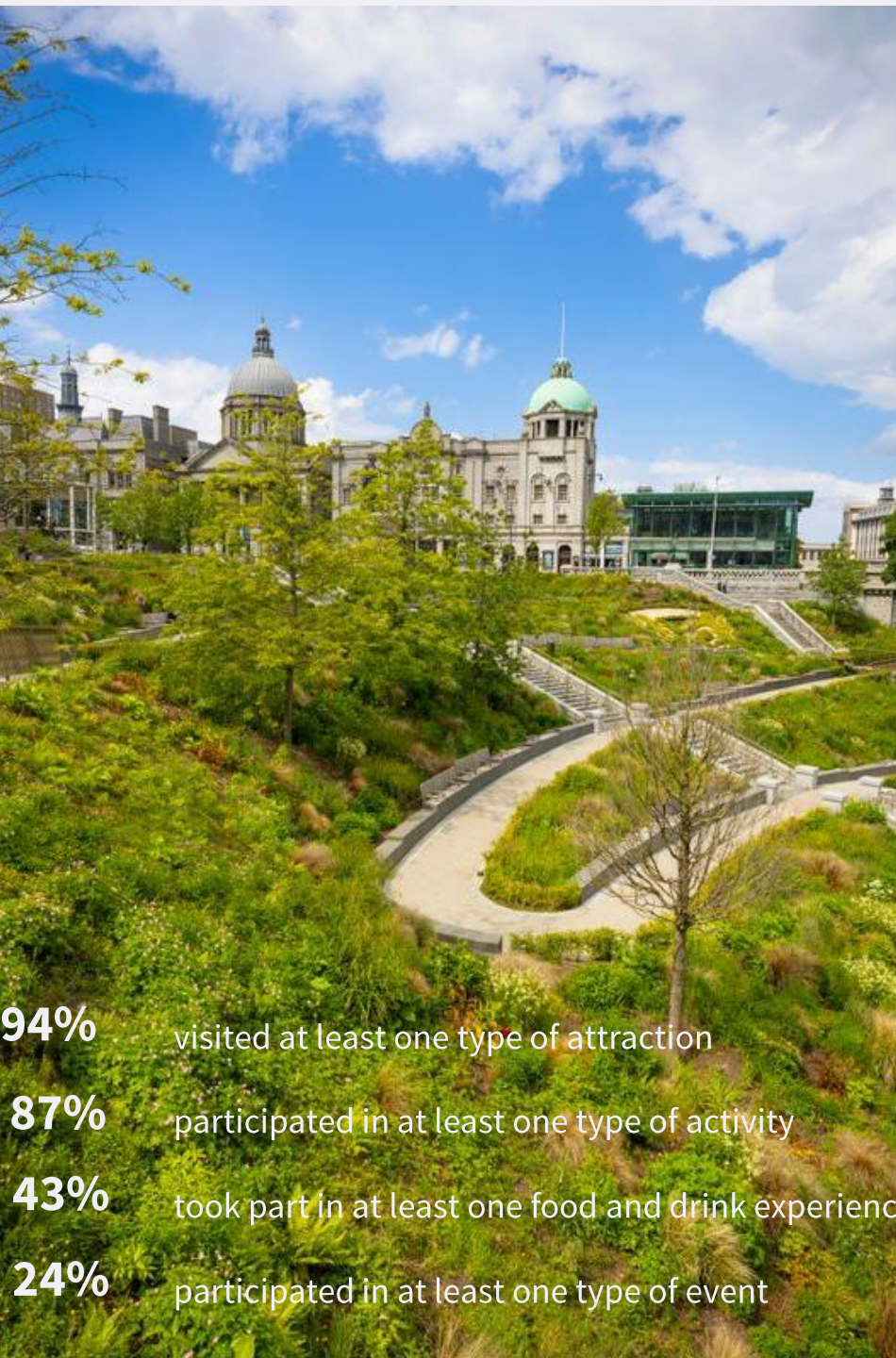
36% participated in at least one type of event

4. European visitors

European visitors are also looking for many experiences on a international break and may have a higher interest in cultural activities than the domestic market.

As well as engaging with history and culture, our European visitors are also exploring our scenery and landscape which is their top motivation to visit and linked to their desire to connect with nature when here.

European visitors were more likely to visit scenic outdoor attractions such as archaeological sites, country parks, gardens and nature reserves, as well as engaging in hillwalking.



94% visited at least one type of attraction

87% participated in at least one type of activity

43% took part in at least one food and drink experience

24% participated in at least one type of event

5. UK visitors

In contrast we see that UK visitors show a slightly lower likelihood to visit attractions, activities and events. This is even more prominent for Scots residents.

There may be many factors influencing this;

- many are repeat visitors
- some may feel they know Scotland's history and culture
- they have a strong motivation for overnight trips connected to getting away from it all and hence may be looking for more rest and relaxation from an overnight break than our overseas visitors
- Scottish residents may be exploring Scotland's attractions on day trips which are not covered within the scope of this survey
- the challenge is to encourage domestic overnight visitors to try new areas of Scotland and engage with attractions and activities as part of a longer break.

UK visitors are also less likely to book activities and experiences in advance of their arrival (29%).



6. Satisfaction with attractions, activities and events

64% of visitors were very satisfied with the knowledge and passion of staff at attractions (9 or 10 out of 10).

47% of visitors rated the value for money of attractions at either 9 or 10 out of 10.

We see that ratings for the knowledge and passion of staff are high but value for money scores are lower.

VisitBritain highlights that value for money is a weakness for Britain amongst international travellers. The Scotland Visitor Survey shows that value for money is scored consistently lower for our European visitors in particular.

Maximising interactions with staff where possible may be one element where businesses can deliver an authentic and personal experience which could help to improve the perceptions around value for money.



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