

# 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, **74** overnight visitors to Moray Speyside completed the online survey. The results shown below are based on these visitors to Moray Speyside.

## Profile of overnight visitors to Moray Speyside



**84% Domestic visitors**

- 35% Scotland (residents)
- 49% Rest of UK

*Base: Stage 2 online survey Moray Speyside visitors 74*



**16% International visitors**

- 8% Europe
- 7% Long haul including:
  - 3% North America
  - 5% Australasia
  - 1% Rest of World



**Average number in travel party: 2.3**

**Children (under 16) in party: 10%**

*Base: Stage 2 online survey Moray Speyside visitors 74*

**Life Stage**

Pre-nesters	4%
Families	9%
Older Independents	54%
Retirement Age	33%

*Base: Stage 2 Moray Speyside visitors excluding n/a 73*

## Profile of trip



Moray visitors stayed on average **10.7 nights in total in Scotland including 4.7 nights in Moray**

*Base: Stage 2 online survey Moray Speyside visitors 74*



**14% of visitors to Moray Speyside stayed in one coastal location**



**First time visitor: 9%**  
**Repeat visitor: 91%**

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

*Base: Stage 2 online survey Moray Speyside visitors 74*

**Examples of Type of Trip**

- A trip of a lifetime: 3%
- A special holiday/short break: 16%

*Base: Stage 2 Moray Speyside visitors excl. Scotland residents 52*

## Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Moray Speyside sample
1	The scenery and landscape	77%
2	Outdoor activities available	44%
3	The history and culture	41%
4	Visiting friends or family	38%
5	It's easy to get to or close to home	23%
6	Scotland's food and drink	20%
7	A Scottish attraction	19%
8	An event or festival	18%
9	Scotland's people	16%
10	A particular experience found in Scotland	13%
Base: All visitors to Moray Speyside (stage 2)		74

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 Moray Speyside

**16% stayed in serviced accommodation**



**11%**

Hotel, motel, inn



**6%**

Guest house, B&B

**82% stayed in non-serviced accommodation**



**36%**

Camping, caravan, motorhome



**27%**

Self-catering/ commercial non-serviced rentals



**17%**

Friend's or relative's home

Base: Stage 2 online survey Moray Speyside visitors (priority region) 71

## Satisfaction with accommodation in Moray Speyside

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



**69%**  
9 or 10 out of 10

**Overall welcome provided to you**

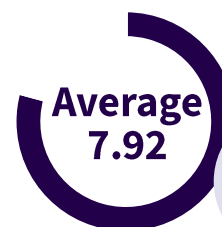
Scotland-wide sample **62%**  
(9 or 10 out of 10)



**57%**  
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)



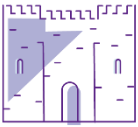
**34%**  
9 or 10 out of 10

**The value for money of accommodation**

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

Base: Stage 2 Moray Speyside visitors in paid for accommodation excl. n/a 53-67

Attractions and activities undertaken in Moray Speyside



Top 5 attractions or activities undertaken/visited in Moray Speyside

Rank	Attractions and activities undertaken in Moray Speyside	Moray Speyside sample
1	Watching wildlife, bird watching – guided or self-guided	38%
2	Hill walk, mountaineering, hike or ramble – guided or self-guided	36%
3	A castle or fort	33%
4	Shopping	33%
5	A nature reserve	32%
Base: Took part in activities/attractions in Moray Speyside		68

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

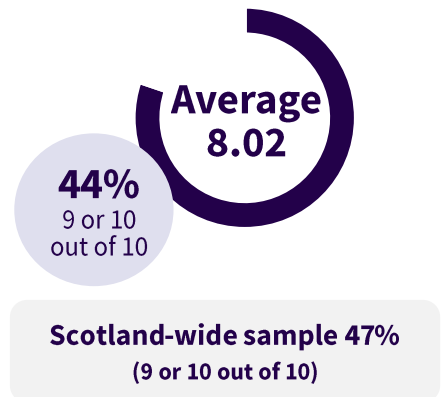
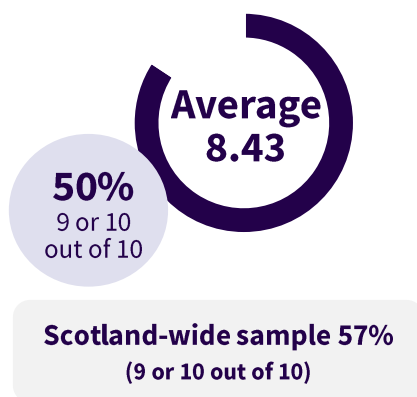
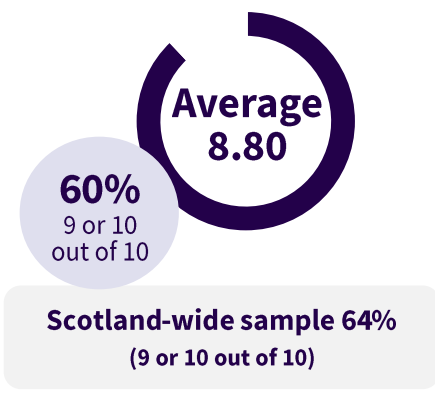
Satisfaction with attractions in Moray Speyside

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions

Quality of experience at attractions

Value for money of paid for attractions



Base: Stage 2 Took part in activities/attractions in Moray Speyside excluding n/a 60-63

Food and drink experiences in Moray Speyside



27% took part in food and/or drink experiences in Moray Speyside

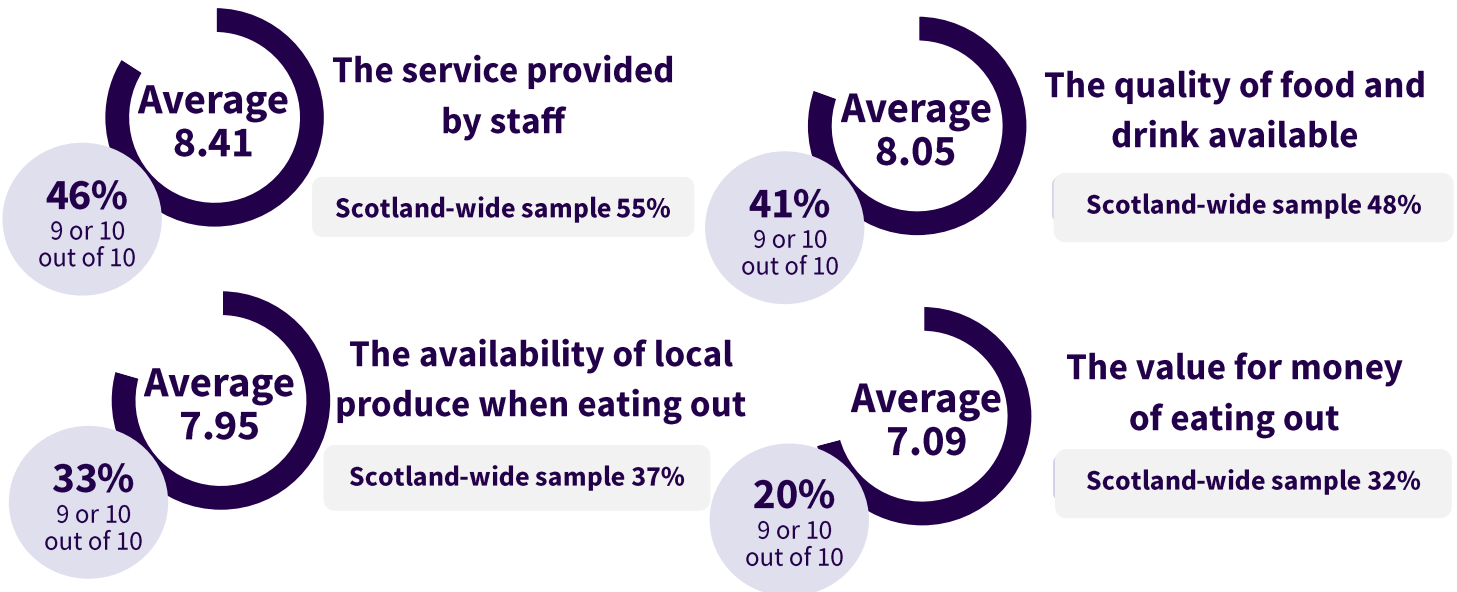
Key food and drink experiences included:

- 13% visited a farm shop/farmers market
- 7% undertook a food or drink activity e.g. cookery class
- 6% visited a fine dining restaurant

Base: Stage 2 Took part in activities/attractions in Moray Speyside 68

## Satisfaction with food and drink experiences in Moray Speyside

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



Base: Stage 2 Moray Speyside visitors excl. n/a 65-72

## Overall experience and likelihood to recommend Moray Speyside



Base: Stage 2 Moray Speyside visitors (priority region) 71

## 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 74 is used this includes all visitors who stayed in Moray Speyside during their trip. Where the base size is 71 this shows results for the visitors who were allocated Moray Speyside 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.
- 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.

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