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, 331 overnight visitors to Fife, including Dunfermline, completed the online survey. The results shown below are based on these visitors to Fife.

Profile of overnight visitors to Fife

**65% Domestic visitors**
- 19% Scotland (Residents)
- 45% Rest of UK

**35% International visitors**
- 11% Europe
- 22% Long haul including
  - 15% North America
  - 7% Australasia
- 2% Rest of World

Average number in travel party: 2.6

Children (under 16) in party: 13%

Profile of trip

Fife visitors stayed on average 10.0 nights in total in Scotland including 4.1 nights in Fife

23% of visitors to Fife stayed in a single coastal location (i.e. did not stay elsewhere)

First time visitor: 19%
Repeat visitor: 81%

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

Examples of Type of Trip

A trip of a lifetime: 10%
A special holiday/short break: 24%
### Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Fife sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>72%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>48%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>29%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>24%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>22%</td>
</tr>
<tr>
<td>7</td>
<td>Scotland’s food and drink</td>
<td>20%</td>
</tr>
<tr>
<td>8</td>
<td>It’s easy to get to or close to home</td>
<td>13%</td>
</tr>
<tr>
<td>9</td>
<td>A Scottish attraction</td>
<td>12%</td>
</tr>
<tr>
<td>10</td>
<td>A particular experience found in Scotland</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base: All visitors to Fife (stage 2 online survey) 331

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</tr>
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<td>Scotland’s food and drink</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<td>It’s easy to get to or close to home</td>
<td>15%</td>
</tr>
<tr>
<td>10</td>
<td>An event or festival</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All visitors to Scotland (stage 2 online survey) 3,011

### Type of accommodation used in Fife

- **34%** stayed in serviced accommodation
  - 26% Hotel, motel, inn
  - 8% Guest house, B&B
  - 1% Serviced apartment

- **68%** stayed in non-serviced accommodation
  - 34% Self-catering/commercial non-serviced rentals
  - 19% Friend’s or relative’s home
  - 16% Camping, caravan, motorhome

Base: Stage 2 Fife visitors (priority region) 239

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

### Satisfaction with accommodation in Fife

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

- **Average 8.77**
  - Overall welcome provided to you
  - Scotland-wide sample 62% (9 or 10 out of 10)

- **Average 8.60**
  - The knowledge of staff/host (at accommodation) about things to do in the area
  - Scotland-wide sample 53% (9 or 10 out of 10)

- **Average 8.15**
  - The value for money of accommodation
  - Scotland-wide sample 42% (9 or 10 out of 10)

Base: Stage 2 Fife visitors in paid for accommodation excl. n/a 237 - 284
Attractons and activities undertaken in Fife

Top 5 attractions or activities undertaken/visited in Fife

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Fife</th>
<th>Fife sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A cathedral, church, abbey or other place of worship</td>
<td>33%</td>
</tr>
<tr>
<td>2</td>
<td>Shopping</td>
<td>32%</td>
</tr>
<tr>
<td>3</td>
<td>A country park or garden</td>
<td>29%</td>
</tr>
<tr>
<td>4</td>
<td>Viewed architecture and buildings</td>
<td>28%</td>
</tr>
<tr>
<td>5</td>
<td>A castle or fort</td>
<td>24%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in Fife 254*

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</tr>
</thead>
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<tr>
<td>1</td>
<td>A castle or fort</td>
<td>59%</td>
</tr>
<tr>
<td>2</td>
<td>Viewed architecture and buildings</td>
<td>52%</td>
</tr>
<tr>
<td>3</td>
<td>A museum or art gallery</td>
<td>50%</td>
</tr>
<tr>
<td>4</td>
<td>A historic house, palace, stately home</td>
<td>49%</td>
</tr>
<tr>
<td>5</td>
<td>Shopping</td>
<td>47%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in Scotland 3,011*

Satisfaction with attractions in Fife

*Satisfaction with… (Scored out of 10)*

- **Knowledge and passion of the staff at attractions**: Average 8.77 62% 9 or 10 out of 10
- **Quality of experience at attractions**: Average 8.63 57% 9 or 10 out of 10
- **Value for money of paid for attractions**: Average 8.25 47% 9 or 10 out of 10

*Scotland-wide sample 64% (9 or 10 out of 10) 57% (9 or 10 out of 10) 47% (9 or 10 out of 10)*

*Base: Stage 2 Took part in activities/attractions in Fife excl. n/a 213-227*

Food and drink experiences in Fife

40% took part in food and/or drink experiences in Fife

- 24% visited a farm shop/farmers market
- 13% visited a fine dining restaurant
- 1% undertook a food or drink activity e.g. cookery class

*Base: Stage 2 Took part in activities/attractions in Fife 254*
Satisfaction with food and drink experiences in Fife

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

- **The service provided by staff**
  - Average 8.52
  - 52% 9 or 10 out of 10
  - Scotland-wide sample 55%

- **The quality of food and drink available**
  - Average 8.27
  - 45% 9 or 10 out of 10
  - Scotland-wide sample 48%

- **The availability of local produce when eating out**
  - Average 8.03
  - 41% 9 or 10 out of 10
  - Scotland-wide sample 37%

- **The value for money of eating out**
  - Average 7.73
  - 31% 9 or 10 out of 10
  - Scotland-wide sample 32%

*Base: Stage 2 Fife visitors excl. n/a 309 - 330*

Overall experience and likelihood to recommend Fife

- **Positive rating of holiday/short break experience**
  - (9 or 10 out of 10)
  - 68% Fife
  - 71% for Scotland overall (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - (9 or 10 out of 10)
  - 79% Fife
  - 82% for Scotland overall (Scotland-wide sample)
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 331 is used this includes all visitors who stayed in Fife, including Dunfermline, during their trip. Where the base size is 239 this shows results for the visitors who were allocated Fife 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 on visitscotland.org for more information on this survey.

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