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, 156 overnight visitors to the Scottish Borders completed the online survey. The results shown below are based on these visitors to the Scottish Borders.

Profile of overnight visitors to the Scottish Borders

75% Domestic visitors

- 11% Scotland (residents)
- 64% Rest of UK

25% International visitors

- 8% Europe
- 17% Long haul
- 11% North America
- 6% Australasia

Average number in travel party: 2.3

Children (under 16) in party: 3%

Profile of trip

Scottish Borders visitors stayed on average 10.3 nights in total in Scotland including 3.1 nights in the Scottish Borders

74% of visitors to the Scottish Borders toured around Scotland, staying in two or more places

First time visitor: 12%

Repeat visitor: 88%

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

Examples of Type of Trip

A trip of a lifetime: 7%
A special holiday/short break: 18%
Local Area Factsheet: Scottish Borders

Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Scottish Borders sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>74%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>52%</td>
</tr>
<tr>
<td>3</td>
<td>Visiting friends or family</td>
<td>30%</td>
</tr>
<tr>
<td>4</td>
<td>Outdoor activities available</td>
<td>27%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>23%</td>
</tr>
<tr>
<td>6</td>
<td>My or my family’s Scottish ancestry</td>
<td>21%</td>
</tr>
<tr>
<td>7</td>
<td>A Scottish attraction</td>
<td>18%</td>
</tr>
<tr>
<td>8</td>
<td>It’s easy to get to or close to home</td>
<td>19%</td>
</tr>
<tr>
<td>9</td>
<td>A specific hotel or other accommodation</td>
<td>13%</td>
</tr>
<tr>
<td>10</td>
<td>A personal event or ceremony</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: All visitors to the Scottish Borders (stage 2) 156

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>70%</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>27%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>21%</td>
</tr>
<tr>
<td>6</td>
<td>A Scottish attraction</td>
<td>19%</td>
</tr>
<tr>
<td>7</td>
<td>My or my family’s Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<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) 3,011

Type of accommodation used in the Scottish Borders

48% stayed in serviced accommodation
- 36% Hotel, motel, inn
- 11% Guest house, B&B
- 1% Serviced apartment

53% stayed in non-serviced accommodation
- 20% Self-catering/commercial non-serviced rentals
- 20% Camping, caravan, motorhome
- 11% Friend’s or relative’s home

Base: Stage 2 Scottish Borders visitors (priority region) 121
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 the Scottish Borders

Satisfaction with...
(Scored out of 10)

- **Overall welcome provided to you**: Average 8.89
  - Scotland-wide sample 62% (9 or 10 out of 10)
  - 70% 9 or 10 out of 10

- **The knowledge of staff/host (at accommodation) about things to do in the area**: Average 8.55
  - Scotland-wide sample 53% (9 or 10 out of 10)
  - 49% 9 or 10 out of 10

- **The value for money of accommodation**: Average 8.06
  - Scotland-wide sample 42% (9 or 10 out of 10)
  - 44% 9 or 10 out of 10

Base: Stage 2 Scottish Borders visitors in paid for accommodation excluding n/a 109-133
Attractons and activities undertaken in the Scottish Borders

Top 5 attractions or activities undertaken/visited in the Scottish Borders

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in the Scottish Borders</th>
<th>Scottish Borders sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A cathedral, church, abbey or other place of worship</td>
<td>43%</td>
</tr>
<tr>
<td>2</td>
<td>A historic house, palace, stately home</td>
<td>39%</td>
</tr>
<tr>
<td>3</td>
<td>A castle or fort</td>
<td>34%</td>
</tr>
<tr>
<td>4</td>
<td>Shopping</td>
<td>33%</td>
</tr>
<tr>
<td>5</td>
<td>Viewed architecture and buildings</td>
<td>31%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractons in the Scottish Borders* 115

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Scotland</th>
<th>Scotland wide sample</th>
</tr>
</thead>
<tbody>
<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/attractons in Scotland* 3,011

Satisfaction with attractions in the Scottish Borders

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

Knowledge and passion of the staff at attractions: Average 8.95 (67% 9 or 10 out of 10)

Quality of experience at attractions: Average 8.69 (58% 9 or 10 out of 10)

Value for money of paid for attractions: Average 8.30 (50% 9 or 10 out of 10)

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

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

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

*Base: Stage 2 Took part in activities/attractons in the Scottish Borders excl. n/a 103-108*

Food and drink experiences in the Scottish Borders

22% took part in food and/or drink experiences in the Scottish Borders

Key food and drink experiences included:
- 12% visited a farm shop/farmers market
- 5% visited a fine dining restaurant
- 1% undertook a food or drink activity e.g. cookery class
- 1% went to a food or drink event or festival

*Base: Stage 2 Took part in activities/attractons in the Scottish Borders 115*
**Satisfaction with food and drink experiences in the Scottish Borders**

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

- **The service provided by staff**: Average 8.41
  - Scotland-wide sample 55%
  - 49% 9 or 10 out of 10

- **The quality of food and drink available**: Average 8.17
  - Scotland-wide sample 48%
  - 45% 9 or 10 out of 10

- **The availability of local produce when eating out**: Average 7.84
  - Scotland-wide sample 37%
  - 35% 9 or 10 out of 10

- **The value for money of eating out**: Average 7.75
  - Scotland-wide sample 32%
  - 32% 9 or 10 out of 10

*Base: Stage 2 Scottish Borders visitors excl. n/a 137-151*

**Overall experience and likelihood to recommend the Scottish Borders**

- **Positive rating of holiday/short break experience**: 71% Scottish Borders
  - 71% for Scotland overall (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**: 74% Scottish Borders
  - 82% for Scotland overall (Scotland-wide sample)

*Base: Stage 2 Scottish Borders visitors (priority region) 121*
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 156 is used this includes all visitors who stayed in the Scottish Borders during their trip. Where the base size is 121 this shows results for the visitors who were allocated the Scottish Borders 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.
- The following questionnaire wording was used to describe the area: Scottish Borders (e.g. Peebles, Jedburgh, Melrose)
- 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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