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, 225 overnight visitors to Dumfries and Galloway completed the online survey. The resultsshown below are based on these visitors to Dumfries and Galloway.

Profile of overnight visitors to Dumfries and Galloway

87% Domestic visitors

13% Scotland (Residents)
74% Rest of UK

13% International visitors

4% Europe
9% Long haul including
  4% North America
  5% Australasia

Base: Stage 2 online survey Dumfries and Galloway visitors 225

Average number in travel party: 2.4

Children (under 16) in party: 8%

Life Stage

Pre-nesters 2%
Families 6%
Older Independents 50%
Retirement Age 42%

Base: Stage 2 Dumfries and Galloway visitors excl. n/a 222

Profile of trip

Dumfries and Galloway visitors stayed on average 9.1 nights in total in Scotland Including 3.8 nights in Dumfries and Galloway

26% of visitors to Dumfries and Galloway stayed in one countryside or rural location

First time visitor: 11%
Repeat visitor: 89%

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: 10%

Base: Stage 2 Dumfries and Galloway visitors excluding Scotland residents 201
## Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Dumfries and Galloway sample</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>78%</td>
<td>70%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>4</td>
<td>It's easy to get to or close to home</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland's people</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>6</td>
<td>Visiting friends or family</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>7</td>
<td>A Scottish attraction</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<td>My or my family's Scottish ancestry</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<td>A specific hotel or other accommodation</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>10</td>
<td>Scotland's food and drink</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

Base: All visitors to Dumfries and Galloway (stage 2) 225

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

## Type of accommodation used in Dumfries and Galloway

- **36% stayed in serviced accommodation**
  - 27% Hotel, motel, inn
  - 8% Guest house, B&B
  - 3% Farmhouse

- **66% stayed in non-serviced accommodation**
  - 30% Self-catering/commercial non-serviced rentals
  - 27% Camping, caravan, motorhome
  - 11% Friend's or relative's home

Base: Stage 2 Dumfries and Galloway visitors (priority region) 162

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 Dumfries and Galloway

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

- **Average 8.91**
  - Overall welcome provided to you
  - Scotland-wide sample 62% (9 or 10 out of 10)
  - 68% 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)
  - 58% 9 or 10 out of 10

- **Average 8.42**
  - The value for money of accommodation
  - Scotland-wide sample 42% (9 or 10 out of 10)
  - 53% 9 or 10 out of 10

Base: Stage 2 Dumfries and Galloway visitors in paid for accommodation excl. n/a 148-186
Top 5 attractions or activities undertaken/visited in Dumfries and Galloway

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Dumfries and Galloway</th>
<th>Dumfries and Galloway sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Shopping</td>
<td>47%</td>
</tr>
<tr>
<td>2</td>
<td>A country park or garden</td>
<td>44%</td>
</tr>
<tr>
<td>3</td>
<td>A castle or fort</td>
<td>35%</td>
</tr>
<tr>
<td>4</td>
<td>A historic house, palace, stately home</td>
<td>33%</td>
</tr>
<tr>
<td>5</td>
<td>A museum or art gallery</td>
<td>29%</td>
</tr>
</tbody>
</table>

*Base: Took part in activities/attractions in Dumfries and Galloway 158*

Satisfaction with attractions in Dumfries and Galloway

*Satisfaction with… (Scored out of 10)*

- **Knowledge and passion of the staff at attractions**
  - Average 9.14
  - 69% 9 or 10 out of 10
  - Scotland-wide sample 64% (9 or 10 out of 10)

- **Quality of experience at attractions**
  - Average 8.62
  - 52% 9 or 10 out of 10
  - Scotland-wide sample 57% (9 or 10 out of 10)

- **Value for money of paid for attractions**
  - Average 8.43
  - 50% 9 or 10 out of 10
  - Scotland-wide sample 47% (9 or 10 out of 10)

*Base: Stage 2 Took part in activities/attractions in Dumfries and Galloway excluding n/a 129-139*

Food and drink experiences in Dumfries and Galloway

- 37% took part in food and/or drink experiences in Dumfries and Galloway

  Key food and drink experiences included:
  - 28% visited a farm shop/farmers market
  - 4% visited a fine dining restaurant
  - 3% undertook a food or drink activity e.g. cookery class

*Base: Stage 2 Took part in activities/attractions in Dumfries and Galloway 158*
Satisfaction with food and drink experiences in Dumfries and Galloway

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

- **The service provided by staff**
  - Average: 8.75
  - 57% 9 or 10 out of 10
  - Scotland-wide sample 55%

- **The quality of food and drink available**
  - Average: 8.51
  - 48% 9 or 10 out of 10
  - Scotland-wide sample 48%

- **The availability of local produce when eating out**
  - Average: 8.15
  - 39% 9 or 10 out of 10
  - Scotland-wide sample 37%

- **The value for money of eating out**
  - Average: 7.95
  - 34% 9 or 10 out of 10
  - Scotland-wide sample 32%

Base: Stage 2 Dumfries and Galloway visitors excl. n/a 202-213

**Overall experience and likelihood to recommend Dumfries and Galloway**

- **Positive rating of holiday/short break experience**
  - (9 or 10 out of 10)
  - 66% Dumfries and Galloway
  - 71% for Scotland overall (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - (9 or 10 out of 10)
  - 72% Dumfries and Galloway
  - 82% for Scotland overall (Scotland-wide sample)

Base: Stage 2 Dumfries and Galloway visitors (priority region) 162
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 225 is used this includes all visitors who stayed in Dumfries and Galloway during their trip. Where the base size is 162 this shows results for the visitors who were allocated Dumfries and Galloway as their priority region and were asked more detailed questions. The base size refers to the unweighted base.
- The following questionnaire wording was used to describe the area: Dumfries & Galloway (e.g. Stranraer, Moffat, Gretna)
- 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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Contact Us:

Insight Department
VisitScotland
visitscotland.org visitscotland.com
research@visitscotland.com

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