SCOTLAND VISITOR SURVEY 2015 & 2016

Introduction
The Scotland Visitor Survey was carried out by Jump Research for VisitScotland to enhance understanding of visitor behaviour and the visitor experience in Scotland. 11,743 leisure overnight visitors were interviewed in Scotland between May and September 2015 and 2016. 2,999 responded to a follow-up online survey on their return home. 505 visitors were interviewed in Scottish Borders and 127 visitors answered specific questions about their visit to the area via the follow-up online survey.

Volume and Value
The Scotland Visitor Survey does not provide data on how many visits are made to Scotland or a specific region. To provide this wider context and to provide an overview of tourism to the area, the following data is sourced from the 2015 GB Tourism Survey and International Passenger Survey (latest available at time of publication). These figures are for the full year Jan-Dec 2015:

Scottish Borders (2015)
- 328,000 overnight visits
- 88% domestic visits
- 12% overseas visits
- Top overseas markets: France, Netherlands, Germany, USA, Australia
- £76m total visitor spend

What attracted visitors to come...

Scottish Borders (top 10)
<table>
<thead>
<tr>
<th>Base</th>
<th>127</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The scenery &amp; landscape</td>
<td>67%</td>
</tr>
<tr>
<td>2. The history &amp; culture</td>
<td>47%</td>
</tr>
<tr>
<td>3. A place I have always wanted to visit</td>
<td>42%</td>
</tr>
<tr>
<td>4. Holidayed here before and wanted to return</td>
<td>35%</td>
</tr>
<tr>
<td>5. To get away from it all</td>
<td>34%</td>
</tr>
<tr>
<td>6. The range of activities available</td>
<td>32%</td>
</tr>
<tr>
<td>7. To visit a particular attraction</td>
<td>29%</td>
</tr>
<tr>
<td>8. Its reputation for friendly people</td>
<td>22%</td>
</tr>
<tr>
<td>9. It is easy to get to</td>
<td>22%</td>
</tr>
<tr>
<td>10. To visit family / friends who live there</td>
<td>20%</td>
</tr>
</tbody>
</table>

Scotland (top 10)
<table>
<thead>
<tr>
<th>Base</th>
<th>11743</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The scenery &amp; landscape</td>
<td>50%</td>
</tr>
<tr>
<td>2. The history &amp; culture</td>
<td>33%</td>
</tr>
<tr>
<td>3. Holidayed here before and wanted to return</td>
<td>24%</td>
</tr>
<tr>
<td>4. To get away from it all</td>
<td>23%</td>
</tr>
<tr>
<td>5. To visit family / friends who live there</td>
<td>20%</td>
</tr>
<tr>
<td>6. It is easy to get to</td>
<td>16%</td>
</tr>
<tr>
<td>7. Closeness to home</td>
<td>15%</td>
</tr>
<tr>
<td>8. Its reputation for friendly people</td>
<td>15%</td>
</tr>
<tr>
<td>9. To visit cities</td>
<td>15%</td>
</tr>
<tr>
<td>10. A place I have always wanted to visit</td>
<td>15%</td>
</tr>
</tbody>
</table>

Two-thirds of visitors were attracted to visit Scottish Borders because of the scenery and landscape. The history and culture of the area was also important for just under half of visitors; and 34% mentioned the desire to get away from it all as a driver to visit Scottish Borders. Conversely, the range of activities available in the area was mentioned as a motivation to visit by 32%; the second highest of all regions in Scotland.

Whilst 42% of visitors expressed a long-held desire to visit the area, just over a third had previously visited the area and were keen to return.
Almost a third of visitors to the Scottish Borders stayed in hotels, making this the most popular form of accommodation in the area. B&Bs and guest houses were used by just over a quarter of visitors and 23% stayed in self-catering accommodation. The Scottish Borders attracted the highest proportion of visitors in touring caravans or motorhomes of any area, with 18% of visitors choosing this type of accommodation.

Sightseeing by car, coach or on foot was the most popular activity undertaken by 72% of visitors in the Scottish Borders. Just under three-fifths visited a historic house, stately home or castle whilst 53% visited a cathedral, church, abbey or other religious building.

Outdoor activities were also particularly important for visitors to the Scottish Borders with short walks mentioned by over half of visitors and long walks, rambles or hikes by 43%. Country parks and gardens were visited by just under two-fifths and beaches by 30% of visitors to this area.
Visitors were asked to rate various aspects of their visitor experience in Scottish Borders on a scale of 1 to 10 (with 1 being extremely dissatisfied through to 10 as extremely satisfied).

Visitors to the Scottish Borders gave their highest satisfaction ratings to the ease of getting around the area; whilst accommodation staff service and local knowledge, and the value for money of attractions were also highly rated.

Consistent with other areas, lowest scores were recorded for satisfaction with the provision of free Wi-Fi at accommodation, and the measures relating to eating out, suggesting these could be the focus of future improvements in the Scottish Borders.

- **Satisfaction with value for money of accommodation**: Average 7.8, 36% scored 9 or 10 on the scale.
- **Satisfaction with service provided by staff at accommodation**: Average 8.2, 48% scored 9 or 10 on the scale.
- **Satisfaction with knowledge of staff at accommodation about things to do in the local area**: Average 8.1, 42% scored 9 or 10 on the scale.
- **Satisfaction with availability of free Wi-Fi at accommodation**: Average 6.9, 40% scored 9 or 10 on the scale.
- **Satisfaction with value for money of eating out**: Average 7.2, 21% scored 9 or 10 on the scale.
- **Satisfaction with the availability of local produce when eating out**: Average 7.5, 24% scored 9 or 10 on the scale.
- **Satisfaction with ease of getting around**: Average 8.7, 61% scored 9 or 10 on the scale.
- **Satisfaction with value for money of attractions**: Average 8.1, 47% scored 9 or 10 on the scale.
**Overall Experience**

**Scottish Borders**

- **Your overall experience?**
  - 33% Extremely good
  - 28% Extremely good
  - 11% Extremely good
  - 3% Extremely good
  - 0% Extremely good
  - 3% Extremely poor
  - 4% Extremely poor
  - 2% Extremely poor
  - 3% Extremely poor
  - 4% Extremely poor

- **How likely are you to recommend?**
  - 49% Extremely likely
  - 20% Extremely likely
  - 18% Extremely likely
  - 6% Extremely likely
  - 3% Extremely likely
  - 3% Extremely likely
  - 1% Extremely likely
  - 0% Extremely likely
  - 1% Extremely likely
  - 2% Extremely likely

**Overall satisfaction with the visitor experience in Scottish Borders was highly rated, with 94% giving scores of 7 or more out of 10. Just over three-fifths gave a score of 9 or 10 on the scale, indicating very high levels of satisfaction. These top 2 scores (9 or 10) show genuine satisfaction and can foster loyalty. The challenge is to continue to improve the visitor experience to encourage more visitors to award the highest scores on the satisfaction scale. Similarly high numbers scored 7-10 on likelihood to recommend Scottish Borders as a holiday or short break destination, with 69% giving scores of 9 or 10 on the scale. This indicates strong propensity for visitors to recommend the area to friends or family.**

**Appendix**

**Using and interpreting the Scotland Visitor Survey**

- **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
  - For further information and notes on this data please see the Tourism in Scotland and Tourism in Scotland’s Regions fact sheets available within the Research & Statistics section of our corporate website http://www.visitscotland.org/research_and_statistics.aspx
  - The Scotland Visitor Survey is undertaken during the main season 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 May and September 2015 and 2016 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 refers to the unweighted base.