



Insight Department:
Dumfries and Galloway Factsheet | 2019

Published: January 2021





Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Dumfries and Galloway region. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution.

To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on visitscotland.org and indicate changes in tourism performance over time. Yet, it is recommended to refer to the 3-year average figures on page 3 when analysing volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS.

This report starts with an **overall** evaluation of Dumfries and Galloway tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Overall Tourism in Dumfries & Galloway

Latest Figures

A Family Take in the View over a Loch near Cairn Holy I
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Overall Tourism Summary:

Visits, Nights and Spend in Dumfries & Galloway, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (£m)	% Change 2016-18/ 2017-19
Europe	18	-14%	155	+32%	6	+2%
North America	10	+11%	37	-41%	4	-8%
Rest of World	8	-11%	94	+47%	7	+21%
Total International Overnight	36	-8%	286	+17%	17	+6%
Scotland	265	+5%	716	-2%	38	-9%
Rest of Great Britain	434	+3%	1,572	-5%	92	+1%
Total Domestic Overnight	699	+4%	2,288	-4%	131	0%
Total Overnight Tourism	735	+3%	2,574	-2%	148	+1%
Total Day Tourism	5,721	+7%	N/A	N/A	239	-2%
Grand Total	6,456	+7%	2,574	-2%	387	-1%

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Dumfries & Galloway

Tourism Performance | 2019

In 2019, tourism performance in Dumfries and Galloway was **typical for the past several years** (2013-2019), with no drastic increases or decreases in visitor arrivals or spend. While the number of overnight trips declined from 2018, it was above the figures recorded in 2016 and 2017.

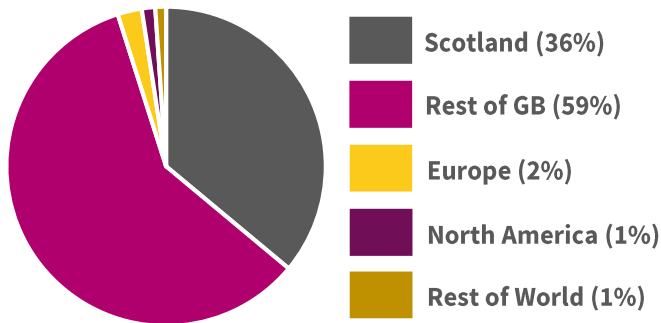
Between 2017 and 2019, the region hosted **735,000 overnight trips** per year on average, a 3% increase from 2016-2018. The number of bednights was nearly **2.6 million** annually (-2%), while overnight tourism expenditure totalled at **£148 million** (+1%).

The slight increase in visits to Dumfries and Galloway in 2017-2019 was driven by a rise in domestic travellers who made just under 700,000 overnight trips to the region per year. This represents 95% of all overnight trips, making Dumfries and Galloway the region with **the highest proportion of British travellers** in the whole of Scotland. Most of the domestic visitors are residents of **England and Wales** – they accounted for 59% of the overnight trips and 63% of the overnight tourism expenditure in Dumfries and Galloway between 2017 and 2019.

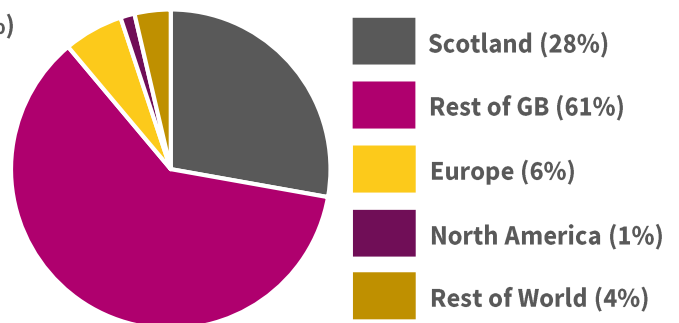
International visitors made **less trips** to Dumfries and Galloway in 2017-2019, mostly as a result of a 14% drop in European travellers to the region. Despite that, **bednights and spend grew** by 17% and 6%, respectively, from 2016-2018.

After increasing significantly in 2016-2018, domestic tourism day visits to Dumfries and Galloway continued to rise, reaching **5.7 million** per year in 2017-2019 (+7%). Associated day spend declined slightly by 2%.

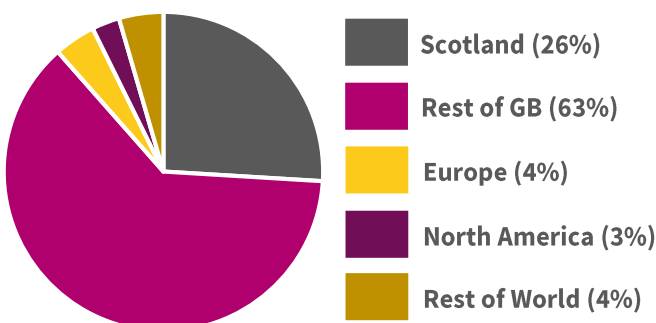
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

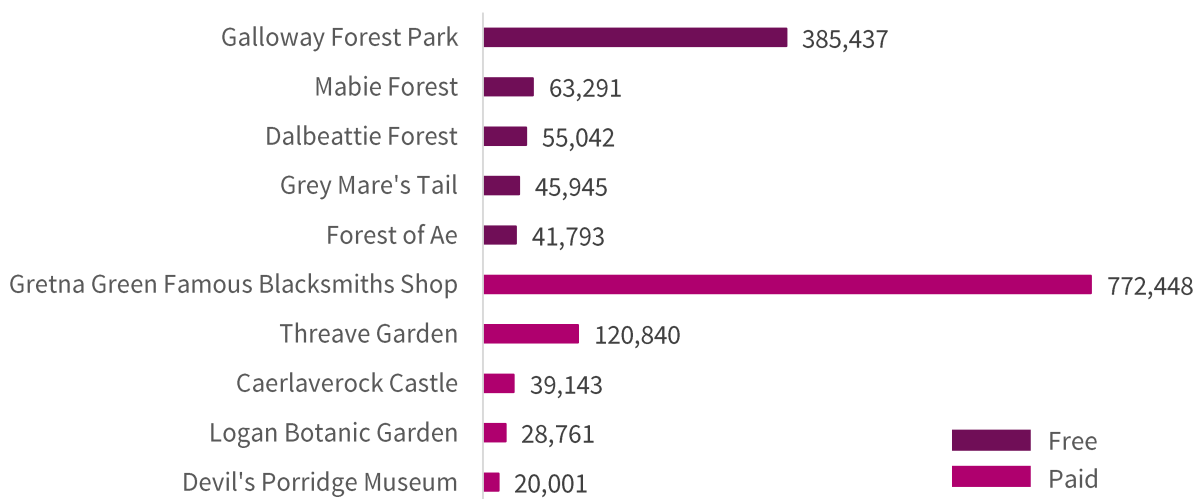
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Dumfries & Galloway	663	+2%	5.9	0%	78.1	-33%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Dumfries & Galloway (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Occupancy Rates by Accommodation Type and Month, Dumfries & Galloway 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	22%	42%	51%	59%	71%	66%	74%	82%	72%	60%	39%	32%	56%
Guest House/B&B (Room Occ.)	19%	24%	27%	57%	74%	73%	74%	80%	68%	56%	29%	32%	51%
Self-Catering* (Unit Occ.)	32%	17%	12%	27%	31%	35%	37%	45%	32%	23%	12%	12%	26%
Hostel* (Bed Occ.)	N/A	N/A	79%	92%	89%	67%	41%	75%	19%	85%	N/A	N/A	44%

Source: SAOS, 2019. * Low sample size.

II. International Visitors to Dumfries & Galloway Overnight Tourism

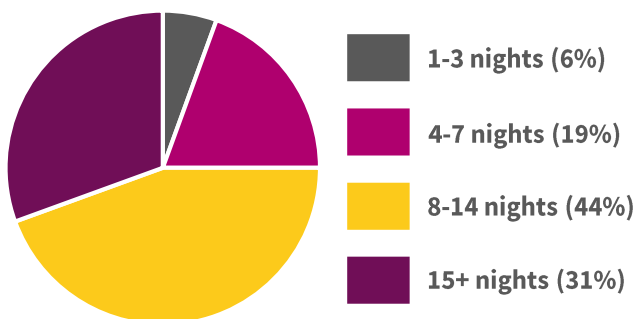
The 8% decline in international trips to Dumfries and Galloway in 2017-2019 did not produce a drop in visitor spend which grew by 6% from 2016-2018. The number of bednights rose more significantly by a sixth suggesting a big **increase** in overseas visitors' **average length of stay**. Indeed, three in four visitors to the region between 2017 and 2019 stayed longer than a week. While the most popular reason to visit Dumfries and Galloway is to go on a holiday, **visiting friends and relatives** is a strong driver for international travel to the region accounting for 35% of all trips in 2017-2019. For Scotland, this share is 26%.

International Tourism Performance, 2019 and 2017-19 Annual Average Figures

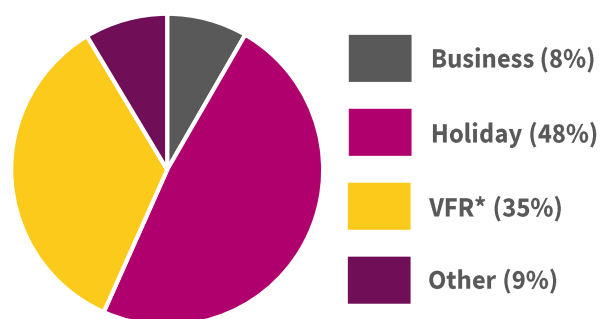
Indicators	Scotland		Dumfries & Galloway			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19*	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	32	-18%	36	-8%
Spend (£M)	2,538	+7%	16	+31%	17	+6%
Nights (000s)	27,385	+8%	357	+28%	286	+17%
Average length of stay	7.9 nights	+16%	11.2 nights	+57%	7.9 nights	+27%
Average spend per day	£93	0%	£44	+2%	£59	-10%
Average spend per visit	£734	+15%	£489	+59%	£472	+15%

Source: IPS, 2019. *Annual Dumfries & Galloway data is based on low sample sizes.

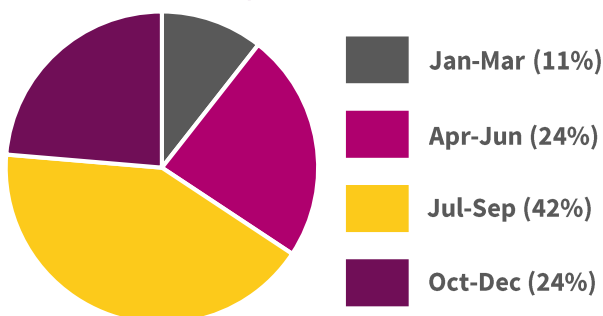
Duration of Stay



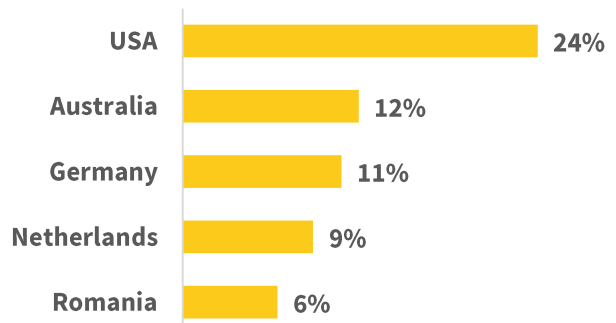
Purpose of Travel



Seasonality



Top 5 Overseas Markets**



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding. *VFR = Visiting friends or relatives. **Based on very low sample sizes.

III. Domestic Visitors to Dumfries & Galloway

Overnight Tourism

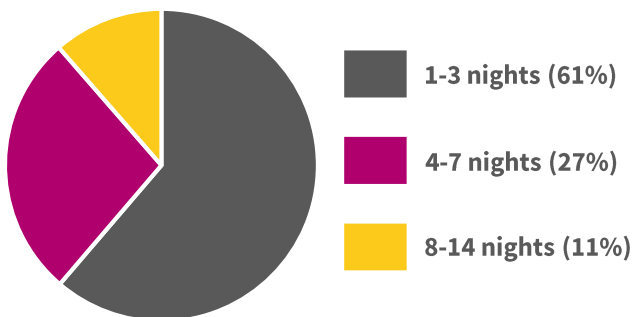
In 2019, domestic overnight tourism to Dumfries and Galloway saw a decline from 2018 which was mostly a result of a **drop in holiday travel** and in visits lasting up to three nights. The total number of trips and bednights decreased by 7% and 4%, respectively, while tourism **expenditure declined by 13%** to £122 million. The region attracted **5.1% of the domestic overnight trips** and **3.8% of the domestic tourism spend** in Scotland in 2019. Between 2017 and 2019, 64% of the British travellers to Dumfries and Galloway were holidaymakers. **Spring** visits continued to increase, while winter travel decreased from 2016-2018.

Domestic Overnight Tourism Performance, 2019

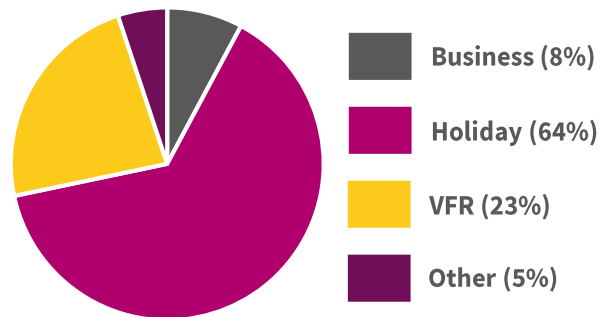
Indicators	Scotland		Dumfries & Galloway			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	708	-7%	699	+4%
Spend (£M)	3,200	+16%	122	-13%	131	0%
Nights (000s)	46,413	+15%	2,363	-4%	2,288	-4%
Average length of stay	3.4 nights	-2%	3.3 nights	+4%	3.3 nights	-7%
Average spend per day	£69	+1%	£52	-10%	£57	+4%
Average spend per visit	£232	-1%	£172	-7%	£188	-4%

Source: GBTS, 2019.

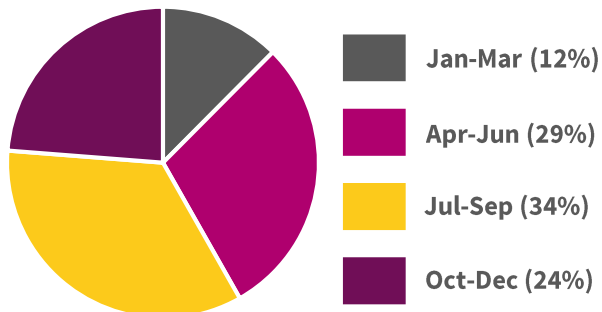
Duration of Stay



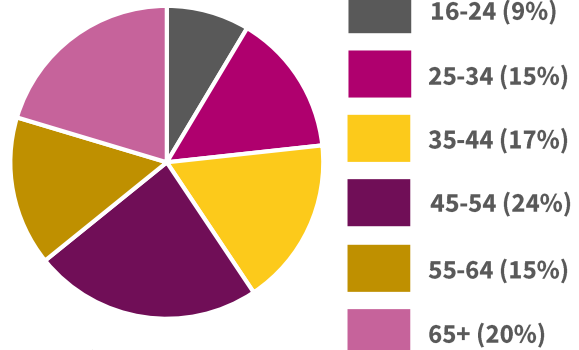
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.

Domestic Day Visits to Dumfries & Galloway

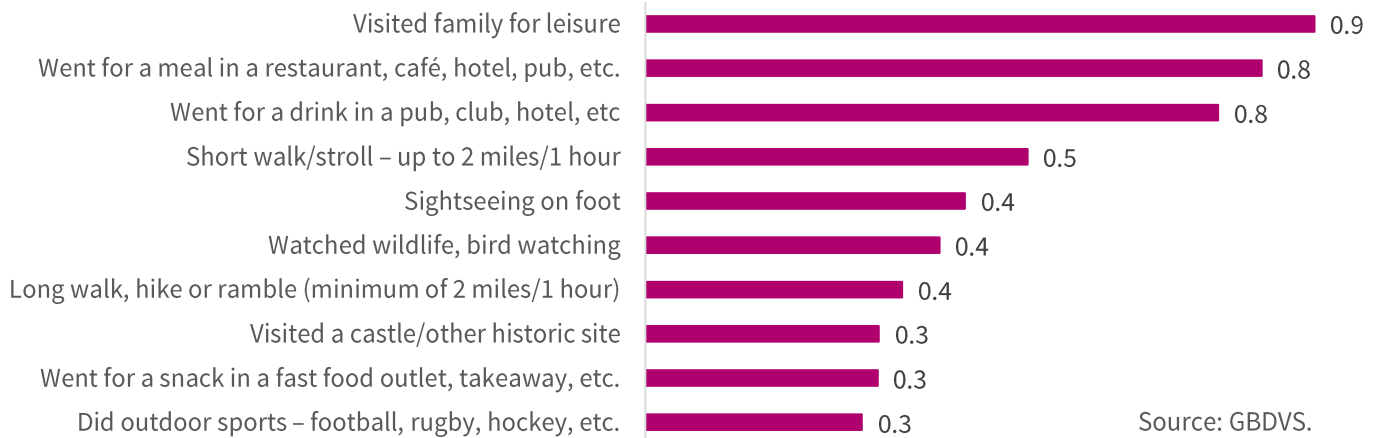
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Dumfries & Galloway	5.7	+7%	239	-2%

Source: GBDVS.

Most Popular Activities Undertaken as Part of a Day Trip, Dumfries & Galloway: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.



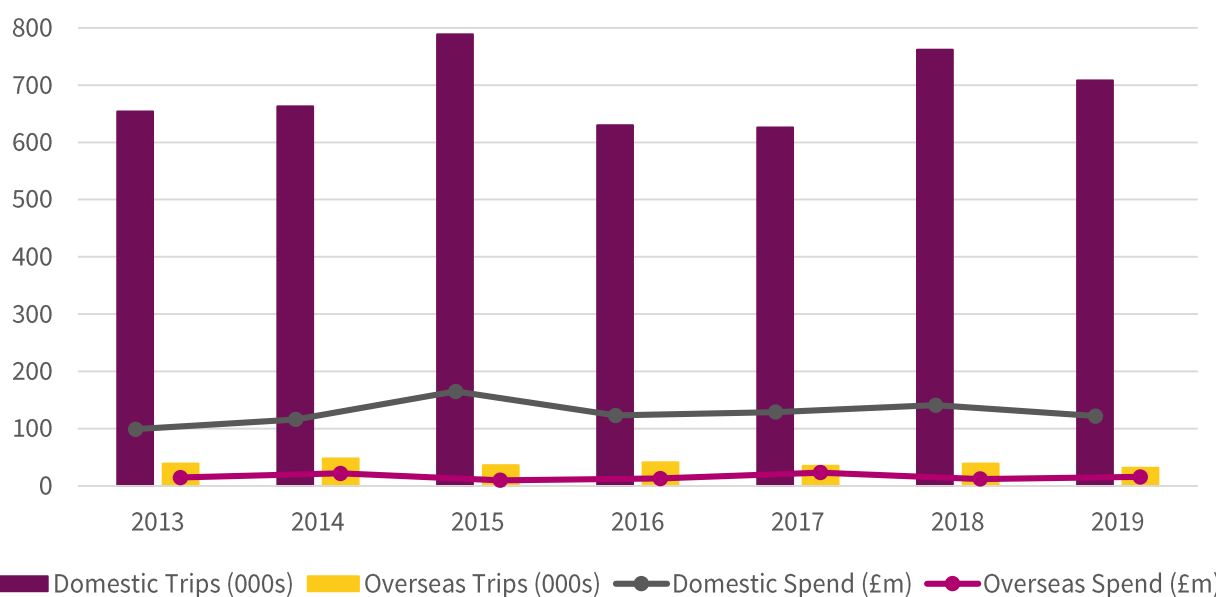
Looking out over Clatteringshaws Loch
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Visitors to Dumfries & Galloway

Historical Trend Information | 2013 - 2019

While overnight **trips** to Dumfries and Galloway declined from just over 800,000 in 2018 to 740,000 in 2019, they were well above the estimates for 2016 and 2017, and **2% above the annual average for the 2013-2018 period**. This was underlain by the number of domestic visits which was the third highest since 2013. The same observation does not apply to **total expenditure** which in 2019 was the lowest in three years and **5% below** the 2013-2018 annual average. Despite some notable annual variations, overnight tourism performance in the region has been relatively consistent up to 2019. There was no significant change in the total volume and value of trips from 2014-2016 to 2017-2019.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	654	663	789	630	626	762	708
International (000s)	39	48	36	41	35	39	32
Total Overnight (000s)	693	711	825	671	661	801	740

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	99	116	165	123	129	141	122
International (£m)	15	22	10	13	23	12	16
Total Overnight (£m)	114	138	175	136	152	153	138

Sources: GBTS, IPS.

Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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