

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

Base: Stage 2 online survey Fife visitors 331

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%

Base: Stage 2 online survey Fife visitors 331

Life Stage

Pre-nesters	6%
Families	11%
Older Independents	44%
Retirement Age	40%

Base: Stage 2 online survey Fife visitors excl. n/a 323

Profile of trip



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

Base: Stage 2 online survey Fife visitors 331



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)

Base: Stage 2 online survey Fife visitors 331

Examples of Type of Trip

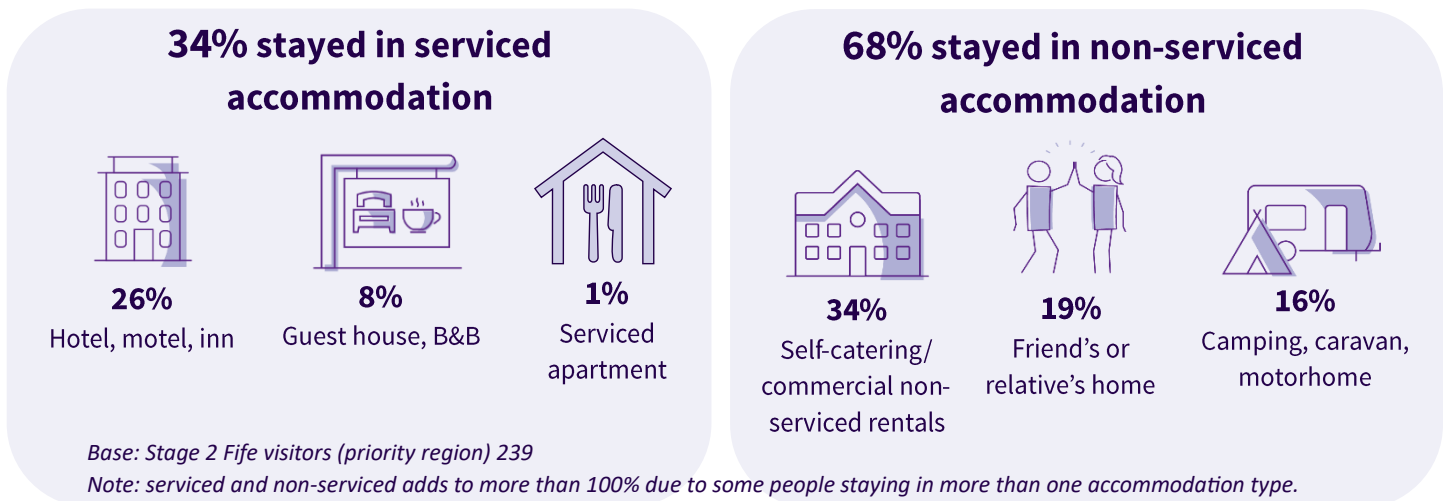
- A trip of a lifetime: 10%
- A special holiday/short break: 24%

Base: Stage 2 online survey Fife visitors excl. Scotland residents

Reasons for choosing Scotland

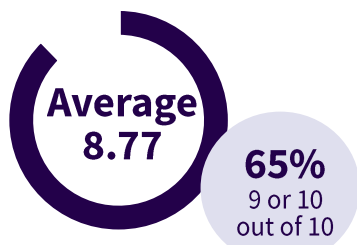
Rank	Top ten reasons for choosing Scotland	Fife sample	Rank	Top ten reasons for choosing Scotland	Scotland-wide sample
1	The scenery and landscape	72%	1	The scenery and landscape	70%
2	The history and culture	48%	2	The history and culture	48%
3	Outdoor activities available	33%	3	Outdoor activities available	27%
4	Visiting friends or family	29%	4	Visiting friends or family	22%
5	Scotland's people	24%	5	Scotland's people	21%
6	My or my family's Scottish ancestry	22%	6	A Scottish attraction	19%
7	Scotland's food and drink	20%	7	My or my family's Scottish ancestry	16%
8	It's easy to get to or close to home	13%	8	Scotland's food and drink	15%
9	A Scottish attraction	12%	9	It's easy to get to or close to home	15%
10	A particular experience found in Scotland	10%	10	An event or festival	9%
Base: All visitors to Fife (stage 2 online survey)		331	Base: All visitors to Scotland (stage 2 online survey)		3,011

Type of accommodation used in Fife



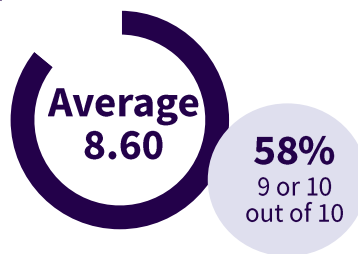
Satisfaction with accommodation in Fife

Satisfaction with... (Scored out of 10)



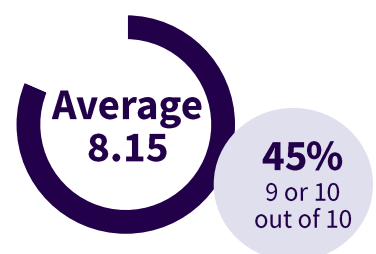
Overall welcome provided to you

Scotland-wide sample 62% (9 or 10 out of 10)



The knowledge of staff/host (at accommodation) about things to do in the area

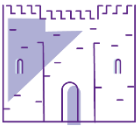
Scotland-wide sample 53% (9 or 10 out of 10)



The value for money of accommodation

Scotland-wide sample 42% (9 or 10 out of 10)

Attractions and activities undertaken in Fife



Top 5 attractions or activities undertaken/visited in Fife

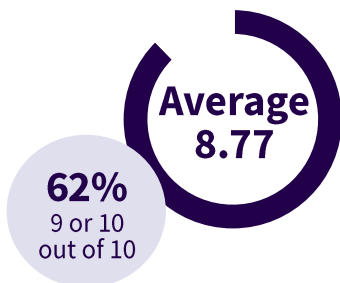
Rank	Attractions and activities undertaken in Fife	Fife sample
1	A cathedral, church, abbey or other place of worship	33%
2	Shopping	32%
3	A country park or garden	29%
4	Viewed architecture and buildings	28%
5	A castle or fort	24%
Base: Took part in activities/attractions in Fife		254

Rank	Attractions and activities undertaken in Scotland	Scotland-wide sample
1	A castle or fort	59%
2	Viewed architecture and buildings	52%
3	A museum or art gallery	50%
4	A historic house, palace, stately home	49%
5	Shopping	47%
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



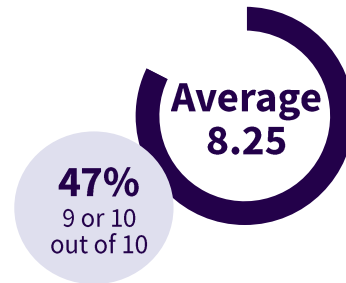
Scotland-wide sample 64%
(9 or 10 out of 10)

Quality of experience at attractions



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

Value for money of paid for attractions



Scotland-wide sample 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

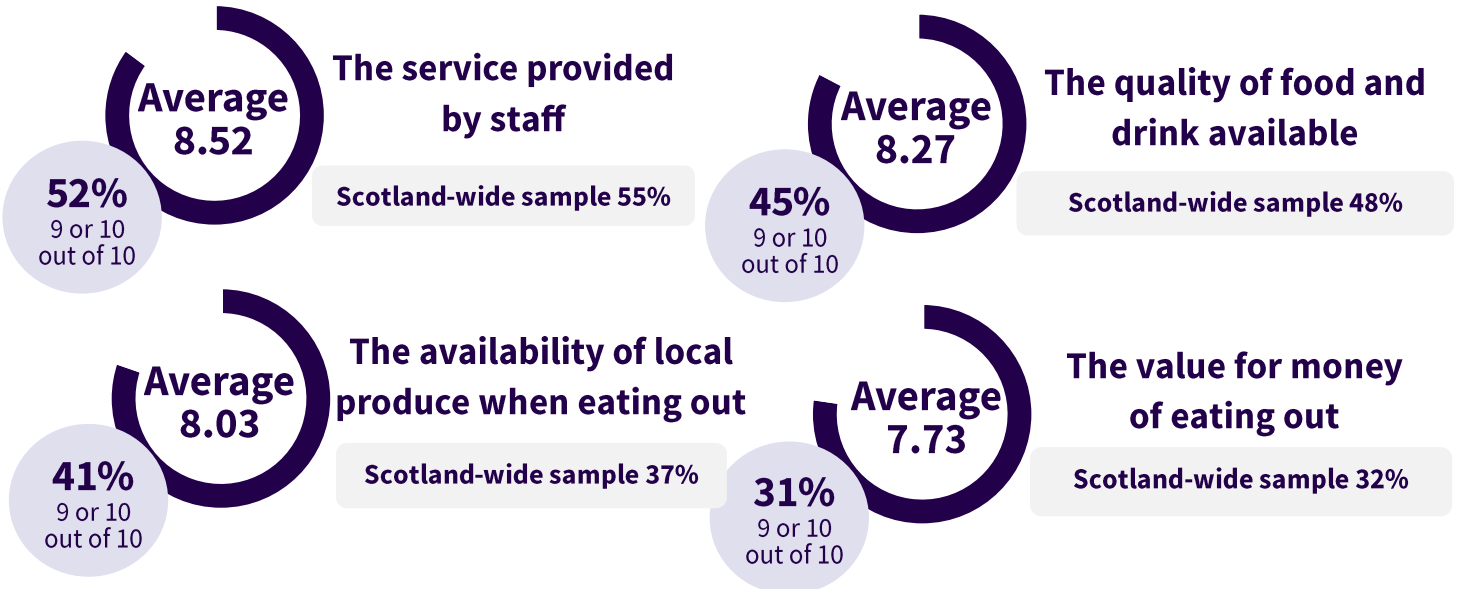
Key food and drink experiences included:

- 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)



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

Overall experience and likelihood to recommend Fife



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](https://visitscotland.org) on visitscotland.org for more information on this survey.

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