

Galloway Kite Trail

Visitor Survey Report

2004-2015

Calum Murray, Adam Dutton and Chris Rollie
(RSPB Scotland)



Contents

Page

3	Acknowledgements
4	Introduction
5	Visitor Questionnaire summary
	Where do visitors to the Galloway Kite Trail usually reside?
	Are respondents on holiday or day tripping from home?
6	Have respondents visited the area previously?
7	Did GKT influence respondent's decision to visit the area?
	What were the main reasons visitors chose to visit the GKT?
8	Accommodation
	Number of nights stayed at holiday location.
9	How did respondents initially hear of the Galloway Kite Trail?
10	Estimated 24 hour spend by respondents
	Economic impact of the GKT within Dumfries & Galloway
12	Age of respondent groups visiting the Galloway Kite Trail
13	Peak visiting times on the GKT
15	Summary
16	Appendices

Acknowledgements

The data in this report over the years were collated by the collective efforts of placement undergraduate and postgraduate students (William Cranstoun, Andrew Cole, Allison Davidson, Stephen Ross, Judith Hartley, Sean Devlin, Clare Rollie, Beckie-Louise MacKinnon, Ross Green and Brooke Morran). Their combined efforts have enabled the reporting of annual findings as well as trends between years for visitor origins, demographics, expenditure and satisfaction.

Economic analysis was also greatly assisted by RSPB economists Dominic Molloy and Adam Dutton, who both helped provide analysis and advice on determining impact of the kite trail and thereby red kites on Dumfries & Galloway's economy.

Introduction

The Galloway Kite Trail (GKT) was launched on October 6th 2003 during the successful reintroduction of red kites into the Loch Ken and surrounding area. The GKT is a community-based project, which was initially set up by RSPB Scotland in partnership with Forestry Commission Scotland and Anne Johnstone of Bellymack Hill Farm (red kite feeding station), with initial funding assistance from Making Tracks, Scottish Natural Heritage, Leader and Dumfries & Galloway Council.

This report presents the findings following analysis of visitor questionnaires distributed across various locations and associated businesses on the GKT. This report is an update on previous data analyses, with the economic impact assessment updated for each individual year.

Table 1: Time period and number of questionnaires used for each report year

Report Year	Time Period	No. of Questionnaires submitted
2004	Oct 03 – Mar 05	100
2005	Apr 05 – Mar 06	100
2006	Apr 06 – Mar 07	100
2007	Apr 07 – Mar 08	174
2008	Apr 08 – Mar 09	153
2009	Apr 09 – Mar 10	68
2010	Apr 10 – Mar 11	61
2011	Apr 11 – Mar 12	145
2012	Apr 12 – Mar 13	126
2013	Apr 13 – Mar 14	217
2014	Apr 14 – Mar 15	291
2015	Apr 15 – Mar 16	282

Although the number of completed questionnaires has increased significantly in the past three years, this is thought to be largely related to the impact of the visitor centre at Bellymack Hill Feeding Station, where most questionnaires are picked up and completed, and doesn't necessarily indicate a growth in visitors (see below).

The kite feeding station provides the most reliable estimate of visitor numbers on the trail and for this reason the annual visitor numbers to the feeding station are used to estimate the economic impact of the project to Dumfries & Galloway. However, the actual number of people using the trail will be higher as not all of them visit the feeding station.

Table 2: Number of visitors (paying adults only) to Bellymack Hill Feeding Station per year, provided by Anne Johnstone (farm owner).

Year	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
No. visitors	Data not disclosed here (at request of farm owner)										

Visitor Questionnaire Survey

1. Where do visitors to the Galloway Kite Trail usually reside?

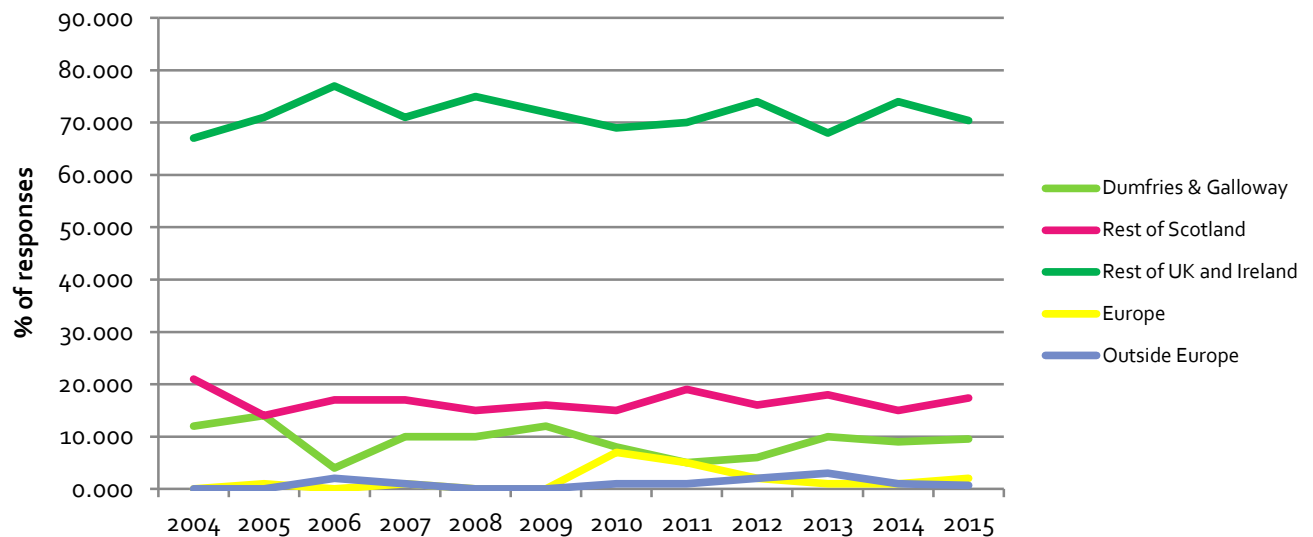


Figure 1: Area in which respondents are resident

As clearly illustrated in Fig 1, most GKT visitors are from the rest of the UK and Ireland, as in previous years. In 2015, there was an increase in visitors coming from the rest of Scotland (also marginally from Dumfries & Galloway). Over the 12-year period, there have been a number of visitors from further afield but as expected, most respondents are from within the UK. Whilst these proportions are also reflected in sites across Dumfries & Galloway, it is perhaps fair to say that visitors from the UK are possibly more likely to fill in such questionnaires, which may not be completed by foreign nationals who do not use English as their first language.

2. Are respondents on holiday or day tripping from home?

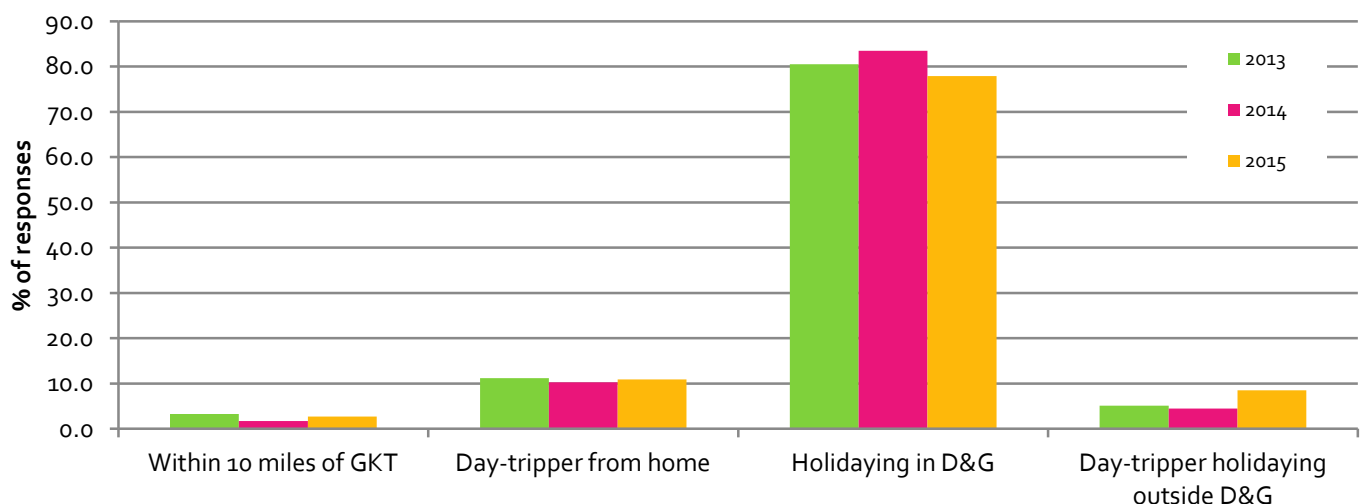


Figure 2: Proportion of respondents either living within the area, day-tripping, or holidaying within Dumfries & Galloway.

This question was introduced in 2013 but is vital in determining whether the visitors have a direct impact on the local economy or not. Categorising the visitors into these four groups shown in Fig 2, helps to determine how each response will be calculated in the overall spend. Day-trippers are also taken into account, as they also contribute to spend in the area (if travelling from outside the Dumfries & Galloway area).

Across all three years most of the respondents were holiday makers to Dumfries & Galloway and therefore most of their spending will contribute to the local economy. Day-trippers from home were the second highest response; these include people from the local area (excluded from the economic analysis) and outwith Dumfries & Galloway. In 2015, there was a 4% increase in people on a day trip from outwith Dumfries & Galloway. Since this question was included, only a small proportion of responses were locals living within 10 miles of the GKT. This may be a low representation of local interest, resulting from less likelihood of returning local visitors completing questionnaires.

3. Have respondents visited the area previously?

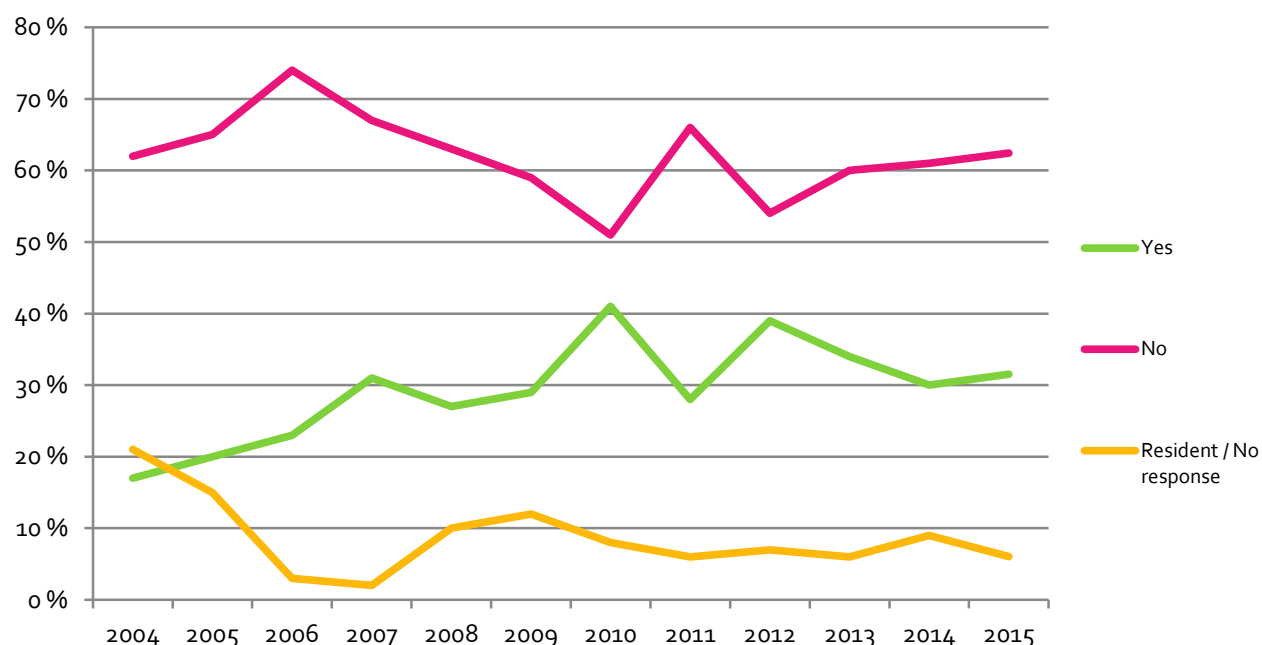


Figure 3: Proportion of returning or first time visitors to Dumfries & Galloway

The proportion of returning visitors to Dumfries & Galloway increased in earlier years to over 30% by 2009 and has remained so (with some fluctuation) to the present (see Fig 3). The proportion of first time visitors has remained higher throughout with a sharp increase in 2011 (following a period of recession in the UK). During the following economic recovery, numbers of first time visitors to this area have increased and this trend continued into 2015. Following the initial launch of the GKT, local respondents (or non-responses) have fallen and remained consistent at around 7%, since 2010.

4. Did GKT influence respondent's decision to visit the area?

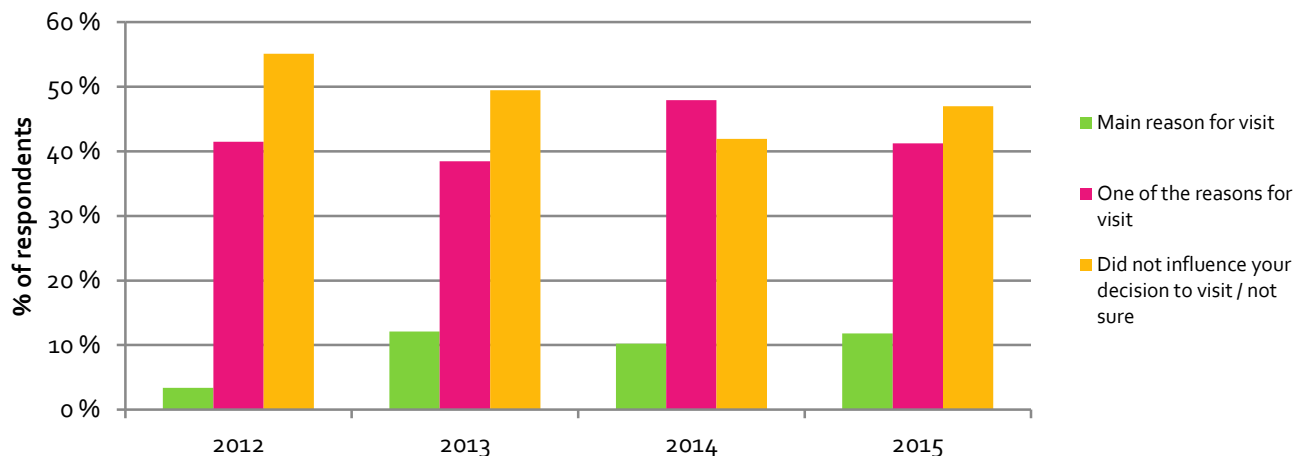


Figure 4: Influence of GKT on visitors' decision to come to Dumfries & Galloway.

The question 'Did the Galloway Kite Trail (or Galloway's red kites) influence your decision to visit Dumfries and Galloway?' was added to the survey in 2012 to help determine economic impact of the GKT using standard calculation methods. This question helps to better understand whether the GKT was an influential factor or not in attracting tourists to Dumfries & Galloway.

Since 2013, respondents ticking 'Main reason' has stayed above 10% while 'One of the reasons' has remained around 40%, peaking to 48% in 2014 (see Fig 4). In the last three years, it has been found that more than half of responses showed that the GKT was a deciding factor in people's decisions to visit Dumfries & Galloway.

5. What were the main reasons visitors chose to visit the GKT?

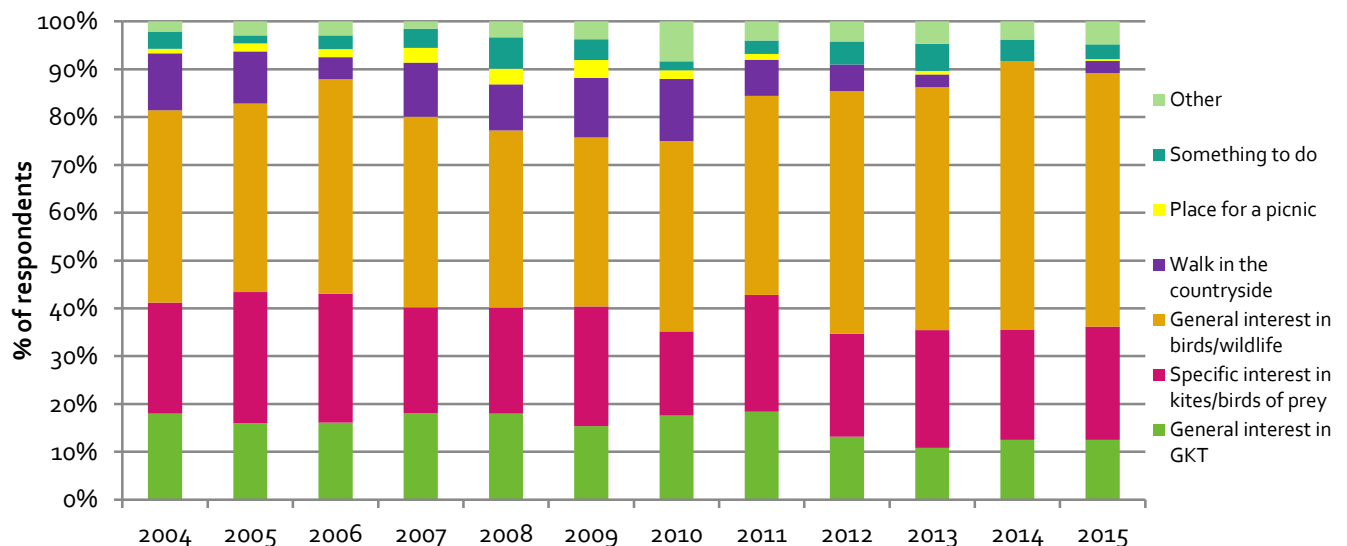


Figure 5: Reasons respondents visited the GKT from 2004 - 2015

As in previous years, the most common reason for visitors coming to the GKT is the 'general interest in birds/wildlife', with more than half of responses selecting this option (see Fig 5). Also consistent with previous years is the proportion of responses opting for a 'specific interest in kites/birds of prey' (at 20 to 25%). As a major wildlife attraction in the region, this has always been expected to be the case.

6. Accommodation

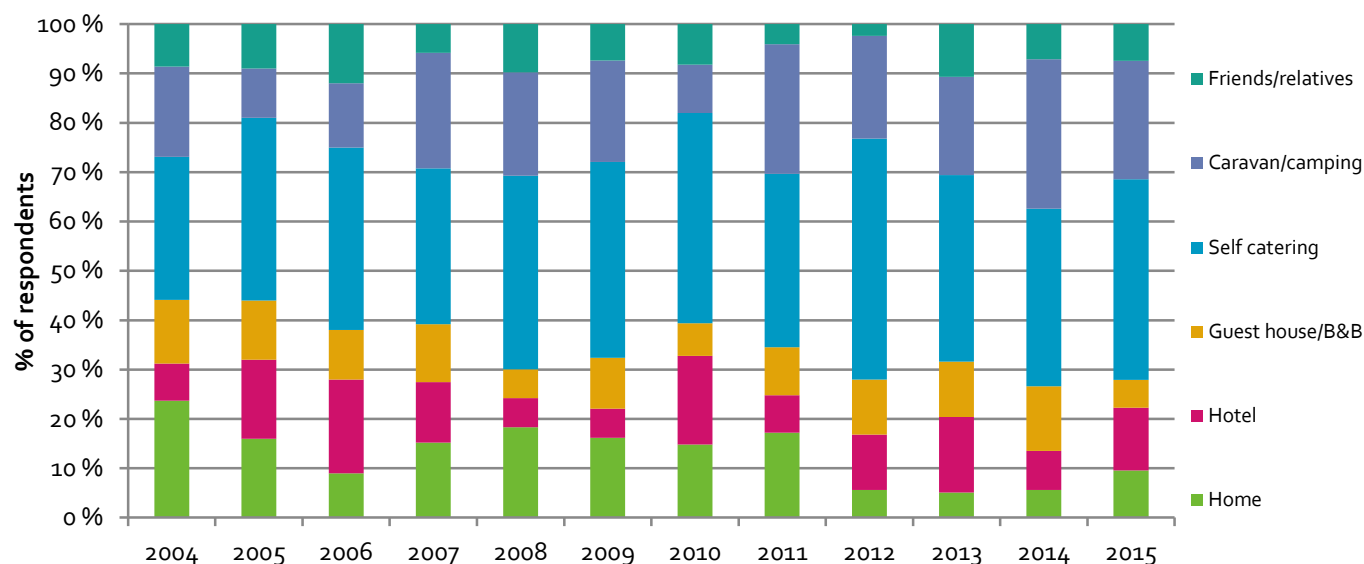


Figure 6: Type of accommodation used by respondents during their stay in the area.

From Fig 6, it is clear that the most popular form of accommodation for visitors to the GKT is self-catering (varying from 29 to 49% over the years). Respondents staying at home have increased by 5% from last year suggesting that more people from the surrounding area are making a trip to the trail. Caravan and camping decreased in 2015, most likely because of poorer weather during the summer months. Other forms of accommodation have remained generally similar with slight fluctuations over the years, again, likely due to weather and economic changes.

7. Number of nights stayed at holiday location.

The general trend over the 12 years of data shows a gradual decline in number of nights stayed but slight increase from 2011 onwards (see Fig 7 below). This could be due to economic recovery within the UK. However, since 2011 this calculation has also considered day-trippers by recording them as 0 nights stayed and therefore may have resulted in lowering the calculated average number of nights stayed. In 2015, the number decreased to 5.8 nights which falls slightly below the overall average of 6.1 nights. This can be influenced by the types of holidaymakers depending on whether they have more disposable time and income or other commitments such as school or work.

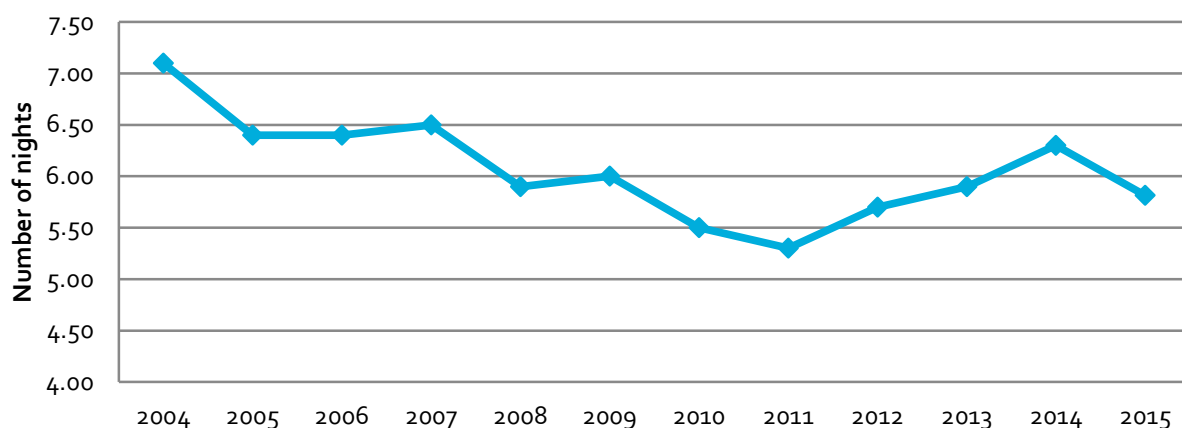


Figure 7: Average number of nights respondents stayed whilst on holiday.

8. How did respondents initially hear of the Galloway Kite Trail?

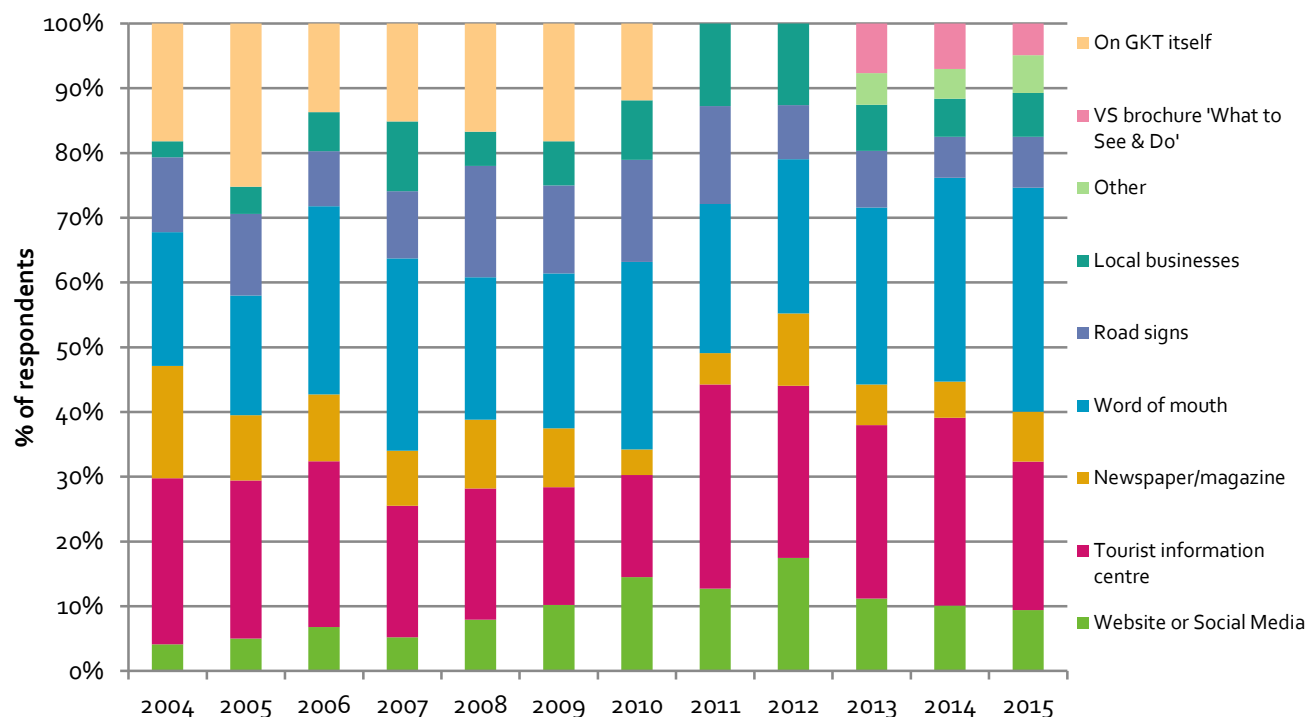


Figure 8: How respondents first came across the Galloway Kite Trail.

As shown in Fig 8, 'Word of mouth' and 'Tourist information centres' are the most common ways in which people hear of the GKT. In 2010, the option to select 'On Galloway Kite Trail itself' was removed and subsequently in 2013, Visit Scotland's brochure 'What to See and Do' was introduced as an option (as the GKT was being advertised in this printed resource and it became necessary to measure its promotional value). Interestingly, the GKT did not feature in this brochure for its 2015 edition and yet was still selected as the main source of finding out by 4.9% of respondents! The attraction has since been re-advertised in the VS brochure's 2016 edition.

9. Estimated 24 hour spend by respondents

Table 3: Estimated 24 hour spend by respondents

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Mean 24h spend	£83.25	£97.10	£109.80	£118.63	£99.83	£174.21	£131.54	£122.16	£109.12

Table 3 shows a general increase in the average 24 hour spend by respondents, from 2007 to 2012. However, since 2012 the mean 24 hour spend has gradually decreased. This drop correlates with a reduction in number of nights stayed but may also be a consequence of economic recovery or slight improvement in weather. With a wider demographic of visitors returning and opting to use more affordable accommodation (like camping, rather than hotel stays), it is possible that spend has returned to that found prior to the 2010 recession.

10. Economic impact of the Galloway Kite Trail within Dumfries and Galloway.

Between 2004 and March 2016 the GKT attracted approximately 102,000 visitors (c.86,500 of which were adults). Visitor numbers are recorded at Bellymack Hill Feeding Station and used in this study to represent a minimum figure of visitor numbers for the GKT. However, this is most likely an underestimation of numbers to the trail as a whole.

Table 4: The economic impact of the Galloway Kite Trail on Dumfries and Galloway

Year	Total spend in D&G by visitors to the GKT	Total spend in D&G attributable to the GKT	FTE jobs created in D&G attributable to the GKT
2004	£2,523,317.00	£252,332.00	8.1
2005	£2,802,747.00	£367,861.00	11.57
2006	£3,255,828.00	£453,374.00	13.88
2007	£3,068,179.00	£368,181.00	10.95
2008	£3,538,858.00	£498,094.00	14.39
2009	£5,890,858.00	£690,703.00	19.69
2010	£7,383,293.94	£790,750.78	19.62
2011	£5,021,486.71	£778,079.37	19.31
2012	£7,596,141.58	£1,139,421.24	28.27
2013	£4,668,354.60	£962,848.14	23.89
2014	£4,917,795.12	£1,082,898.49	26.87
2015	£3,954,337.50	£839,765.22	20.84
Total	£54,621,196.45	£8,224,308.24	19.03

In Table 4 above, the calculated spends and subsequent estimate of jobs created (years 2004 to 2009, shown in grey cells) were taken from the 2010 economic impact study by Dominic Molloy & Chris Rollie¹. The method used in the 2010 study is described below:

1. Calculated using visitor numbers, nights stayed, and 24 hour spend by visitors from outside D&G
2. 75% of spend for those who said the GKT was 'the main reason' for visiting D&G and 25% of spend for those who said the GKT was 'one of the reasons' for visiting D&G was attributed to the GKT.
3. Calculated using a deflated average wage given by employment effect multipliers for relevant industries, obtained from the latest Scottish Government input-output tables.

¹ Molloy, D. and Rollie, C.J., 2010. The Galloway Kite Trail: Economic impacts within Dumfries & Galloway. RSPB Scotland, Edinburgh.

Calculations for the years thereafter (in white cells) were made using an updated method set out by RSPB economist Adam Dutton. Since 2010, the calculation method for determining such spend has been changed to reflect additional factors now widely used across the sector. Calculations 2010 to 2015 are now determined using updated employment effect multipliers and take inflation into consideration. The changes were therefore instigated by the RSPB economist Adam Dutton, and although recent figures cannot be precisely compared to data from before 2010, they do provide the latest industry-standard estimation of spend and subsequent jobs created which can be attributed to the GKT.

As with the 2010 study, visitor numbers, mean number of nights stayed, mean 24hr spend and the percentage of visitors (coming from outside of Dumfries & Galloway) were multiplied for each economic year to give the total spend in the region by visitors to the Galloway Kite Trail. 75% of the spend from those who stated that the GKT was 'the main reason' and 33% of spend (a change to the 2010 methodology) from the visitors who said GKT was 'one of the reasons' for visiting the region was attributed to the GKT. The number of full time equivalent jobs created in Dumfries & Galloway attributable to the GKT was then calculated, using deflated average wage given by employment effect multipliers for relevant industries. This average wage deflator was obtained from the latest Scottish Government input-output tables.

In 2015, the GKT and red kites introduced over £839,000 of new spend into Dumfries & Galloway's economy. This income boosted local economy, helping to generate a further 20.8 full time equivalent jobs. In total, since the GKT was launched, more than £8.2 million has been spent in D&G on the back of the trail and red kites, generating on average, 19 full time equivalent jobs every year.

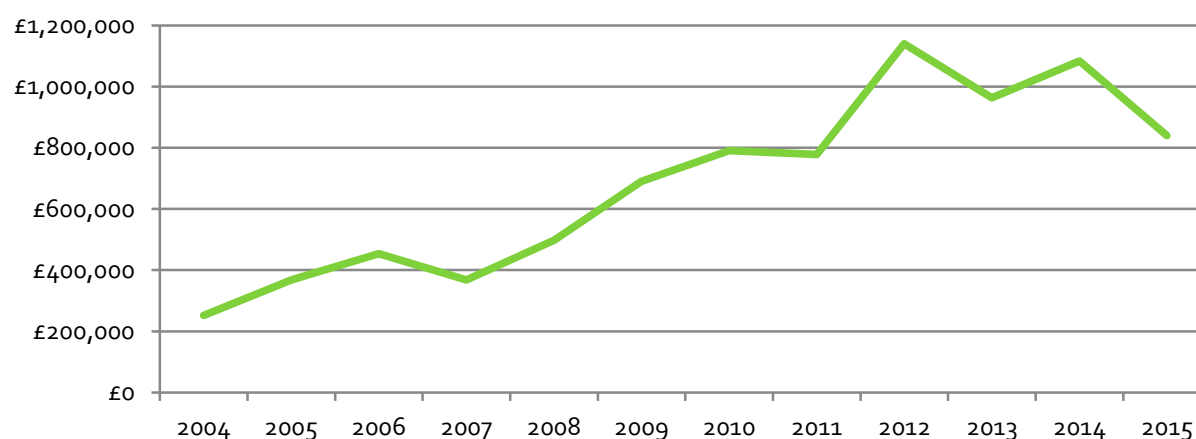


Figure 9: Total spend in Dumfries & Galloway attributable to the GKT per report, from 2004-2015. Findings based on calculations by Dominic Molloy and Adam Dutton (RSPB Economists).

Fig 9 shows the estimated spend in Dumfries & Galloway, attributable to the GKT and red kite project. The graph clearly shows a steep incline from 2004 to 2012 and general decrease from then to 2015. In the last six years there has been a decrease in number of visitors on the GKT (as reported by Anne Johnstone, owner of the feeding station), but interestingly, an apparent rise in spending (especially in 2012 and 2014).

This rise in spending may have been due to the demographic of visitors on the GKT following economic recession of 2010 and/or preference for more expensive accommodation type during that period (2011 and 2012 were very wet summers, followed by cold weather in spring 2013).

11. Age and Gender of respondent groups visiting the Galloway Kite Trail

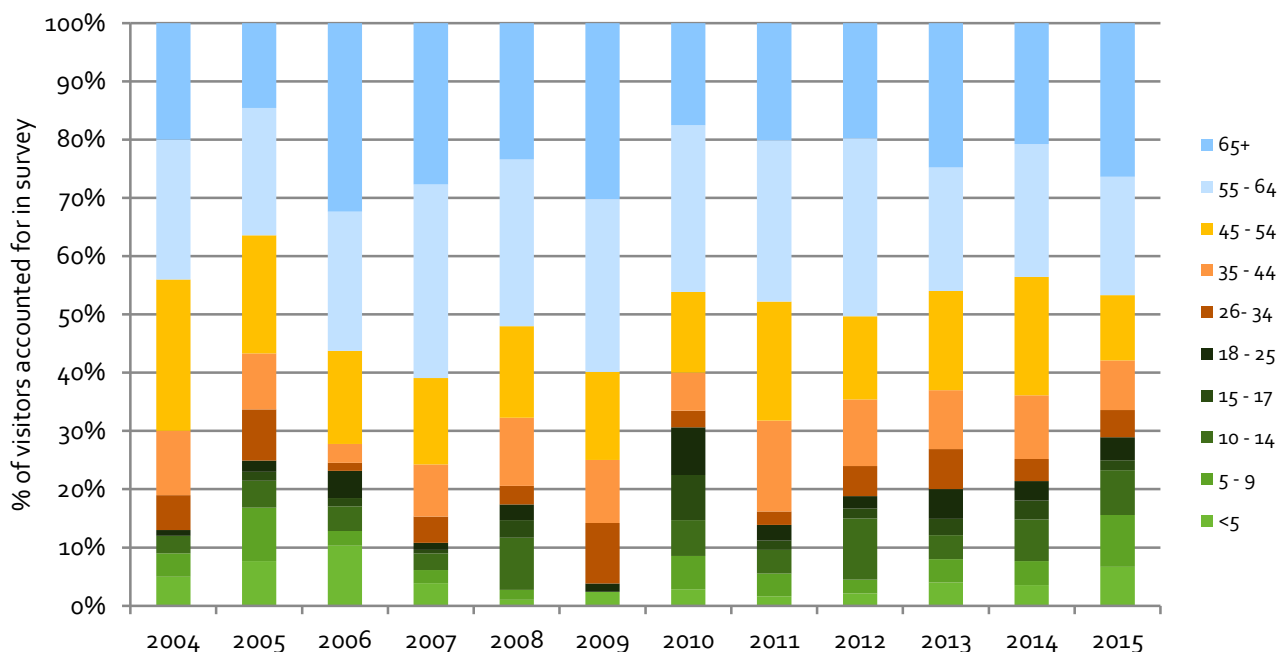


Figure 10: Age of visitors to the Galloway Kite Trail.

The most common age groups to visit the GKT are those of retired and semi-retired age, most likely with more disposable time and/or income. Lower response rates from younger adults may also be due to the lack of child orientated activities on the trail. As a wildlife attraction, the GKT may not be as attractive to families with younger children, compared to other attractions in the area which are specifically aimed at a younger market. However, 2015 saw an increase in the proportions of younger age groups (under 25s), comprising more than a quarter (29%) of people included in survey responses.

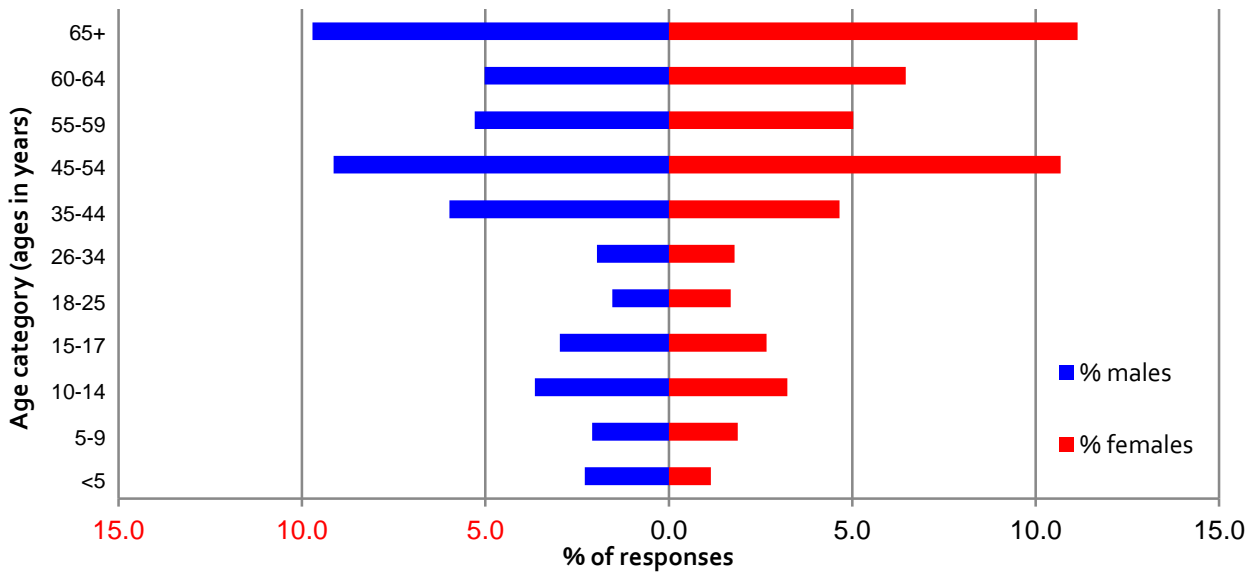


Figure 11: Population pyramid comparing male and female ratios of visitors to the GKT, for respective age groups.

Fig 11 shows a slight variation in the sex ratios for visitors of different age categories. There appears to be more younger males visiting the GKT than females, while women in older age groups are more inclined to visit than men. This Pyramid also highlights the higher volume of older visitors to the GKT than younger individuals, as mentioned in this report above.

12. Peak visiting times on the GKT

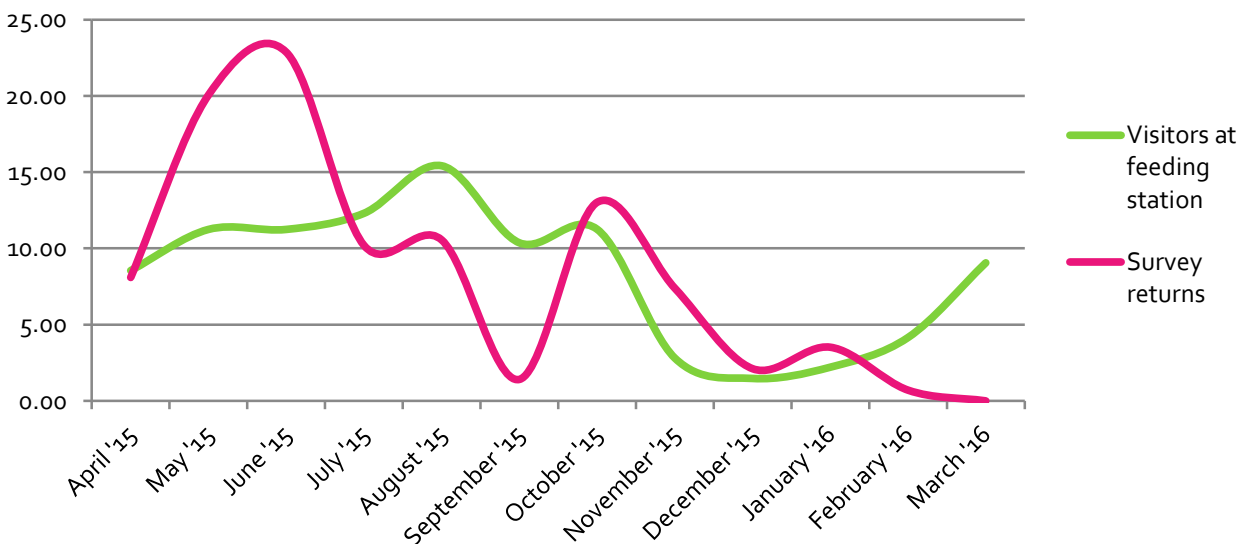


Figure 12: Proportion of visitors and relative proportion of questionnaire surveys completed over the year, showing peak periods. (data shown as the percentage of year totals).

The GKT is an all year round attraction but is more often visited in the spring, summer and autumn (March to October), when tourism in the region is much greater. From the graph it is apparent that numbers increase throughout the spring and summer months, peaking in August before declining, which often correlates with school holiday periods. Peak visit periods in hotter weather tend to show less returns of questionnaires, while quieter or cooler periods have improved survey returns. This may be because questionnaires are left on the tables inside the feeding station centre and thus people are more likely to fill them out when in the visitor centre, rather than on better days when visitors tend to stay outside enjoying the spectacle.

Summary

- Most visitors come from the rest of the UK and Ireland, with over 70% of respondents in 2015 having travelled from the rest of the UK or from Ireland (compared to Scotland).
- The number of respondents that were new to the Dumfries & Galloway area remains around 30%. Returning visitors continue to be higher, at around 60%.
- Self-catering remains the most popular form of accommodation for visitors to the area.
- The average number of nights stayed has dropped slightly since 2014 from 6.3 nights to 5.8 nights.
- In 2015, over £839,000 was spent in Dumfries & Galloway, attributable to the GKT and red kites. This income boosted local economy, helping to generate a further 20.8 full time equivalent jobs.
- In total, since the GKT was launched, more than £8.2 million has been spent in D&G on the back of the trail and red kites, generating on average 19 full time equivalent jobs every year.
- In 2015, more than one quarter (29%) of visitors were youths or young adults (under the age of 25 years), the highest shown since 2010.
- As in previous studies, the majority of respondents are older people of retired/semi-retired ages (55+ years).

Appendix

1. Where are the visitors to The Galloway Kite Trail coming from?

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Dumfries & Galloway	12.00	14.00	4.00	10.00	10.00	12.00	8.00	5.00	6.00	10.00	9.00	9.52
Rest of Scotland	21.00	14.00	17.00	17.00	15.00	16.00	15.00	19.00	16.00	18.00	15.00	17.35
Rest of UK and Ireland	67.00	71.00	77.00	71.00	75.00	72.00	69.00	70.00	74.00	68.00	74.00	70.41
Europe	0.00	1.00	0.00	1.00	0.00	0.00	7.00	5.00	2.00	1.00	1.00	2.04
Outside Europe	0.00	0.00	2.00	1.00	0.00	0.00	1.00	1.00	2.00	3.00	1.00	0.68

2. Are the visitors on holiday or travelling from home?

	2013	2014	2015
Within 10 miles of GKT	3.26	1.70	2.72
Day-tripper from home	11.16	10.30	10.88
Holidaying in D&G	80.50	83.50	77.89
Day-tripper holidaying outside D&G	5.10	4.50	8.50

3. Are visitors new to Dumfries and Galloway?

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Yes	17.00	20.00	23.00	31.00	27.00	29.00	41.00	28.00	39.00	34.00	30.00	31.54
No	62.00	65.00	74.00	67.00	63.00	59.00	51.00	66.00	54.00	60.00	61.00	62.42
No response	21.00	15.00	3.00	2.00	10.00	12.00	8.00	6.00	7.00	6.00	9.00	6.04

4. Reasons for visiting the region

	2012	2013	2014	2015
Main reason for visit	3.40	12.08	10.20	11.83
One of the reasons for visit	41.50	38.48	47.90	41.22
Did not influence your decision to visit / not sure	55.10	49.44	41.90	46.95

4(contd) Reasons for visiting the Galloway Kite Trail

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
General interest in GKT	18.0 0	16.0 0	16.1 0	18.1 0	18.0 0	15.4 0	17.5 9	18.4 0	13.1 9	10.8 4	12.5 0	12.5 0
Specific interest in kites/birds of prey	23.2 0	27.4 0	27.0 0	22.1 0	22.2 0	25.0 0	17.5 9	24.4 0	21.5 3	24.6 3	23.1 0	23.7 1
General interest in birds/wildlife	40.2 0	39.4 0	44.8 0	39.9 0	37.1 0	35.3 0	39.8 1	41.6 0	50.6 9	50.7 4	56.1 0	52.9 4
Walk in the countryside	11.9 0	10.9 0	4.60	11.3 0	9.60	12.5 0	12.9 6	7.60	5.56	2.71	0.00	2.57
Place for a picnic	1.00	1.70	1.70	3.10	3.30	3.70	1.85	1.20	0.00	0.74	0.00	0.37
Something to do	3.60	1.70	2.90	4.00	6.60	4.40	1.85	2.80	4.86	5.67	4.50	3.13
Other	2.10	2.90	2.90	1.50	3.30	3.70	8.33	4.00	4.17	4.68	3.80	4.78

5. Type of accommodation

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Home	23.70	16.00	9.00	15.20	18.30	16.18	14.80	17.20	5.60	5.10	5.60	9.54
Hotel	7.50	16.00	19.00	12.28	5.88	5.88	18.00	7.60	11.20	15.31	7.90	12.72
Guest house/B&B	12.90	12.00	10.00	11.70	5.88	10.29	6.60	9.70	11.20	11.22	13.10	5.65
Self-catering	29.00	37.00	37.00	31.58	39.22	39.71	42.60	35.20	48.80	37.76	36.00	40.64
Caravan/camping	18.30	10.00	13.00	23.39	20.92	20.59	9.80	26.20	20.80	19.90	30.30	24.03
Friends/relatives	8.60	9.00	12.00	5.85	9.80	7.35	8.20	4.10	2.40	10.71	7.10	7.42

6. Number of nights stayed in holiday location.

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
No. Nights Stayed	7.10	6.40	6.40	6.50	5.90	6.00	5.50	5.30	5.70	5.90	6.30	5.81

7. What attracted visitors to the GKT?

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
General interest in GKT	18.0 0	16.0 0	16.1 0	18.1 0	18.0 0	15.4 0	17.5 9	18.4 0	13.1 9	10.8 4	12.5 0	12.5 0
Specific interest in kites/birds of prey	23.2 0	27.4 0	27.0 0	22.1 0	22.2 0	25.0 0	17.5 9	24.4 0	21.5 3	24.6 3	23.1 0	23.7 1
General interest in birds/wildlife	40.2 0	39.4 0	44.8 0	39.9 0	37.1 0	35.3 0	39.8 1	41.6 0	50.6 9	50.7 4	56.1 0	52.9 4
Walk in the countryside	11.9 0	10.9 0	4.60	11.3 0	9.60	12.5 0	12.9 6	7.60	5.56	2.71	0.00	2.57
Place for a picnic	1.00	1.70	1.70	3.10	3.30	3.70	1.85	1.20	0.00	0.74	0.00	0.37
Something to do	3.60	1.70	2.90	4.00	6.60	4.40	1.85	2.80	4.86	5.67	4.50	3.13
Other	2.10	2.90	2.90	1.50	3.30	3.70	8.33	4.00	4.17	4.68	3.80	4.78

8. How did visitors hear of the Trail?

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Website or Social Media	4.13	5.00	6.80	5.20	7.90	10.20	14.47	12.73	17.48	11.20	10.10	9.40
Tourist information centre	25.62	24.40	25.60	20.30	20.30	18.20	15.79	31.52	26.57	26.78	29.00	22.93
Newspaper/magazine	17.36	10.10	10.30	8.50	10.60	9.10	3.95	4.85	11.19	6.28	5.60	7.71
Word of mouth	20.66	18.50	29.10	29.70	22.00	23.90	28.95	23.03	23.78	27.32	31.50	34.59
Road signs	11.57	12.60	8.50	10.40	17.20	13.60	15.79	15.15	8.39	8.74	6.30	7.89
Local businesses	2.48	4.20	6.00	10.80	5.30	6.80	9.21	12.73	12.59	7.10	5.90	6.77
Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.92	4.60	5.83
VS brochure 'What to See & Do'								0.00	0.00	7.65	7.00	4.89
On GKT itself	18.18	25.20	13.70	15.10	16.70	18.20	11.84					

9. Estimated spend by visitors in a 24hr period?

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Mean 24h spend	£83.25	£97.10	£109.80	£118.63	£99.83	£174.21	£131.54	£122.16	£109.12

10. Economic impact of the GKT on Dumfries and Galloway

Findings for years 2010 to 2015 (using updated method set out by Adam Dutton)

Year	Average spend (24h)	Average Nights	Visitor Numbers	Proportion of visitors Non-Local	Total Visitor Spend	Main Reason %	One Reason %
2010	£118.63	5.5	12,300	0.92	£7,383,294	0.08	0.15
2011	£103.89	5.3	9,600	0.95	£5,021,487	0.14	0.16
2012	£174.21	5.80	8,000	0.94	£7,596,142	0.03	0.42
2013	£131.54	5.2	7,500	0.91	£4,668,355	0.12	0.39
2014	£122.16	6.3	7,100	0.9	£4,917,795	0.10	0.48
2015	£109.12	5.8	6,820	0.92	£3,954,337	0.12	0.41

Calculated spends and jobs created (derived from multiplication of factors in above table)

Year	Main - Attributable Spend	One - Attributable Spend	Total - Attributable Spend	Total Spend Attributable including multiplier	Total Spend Attributable (multiplier + inflation)	FTE jobs Supported*
2010	£465,148	£325,603	£790,751	£1,059,606	£1,251,464	19.62
2011	£531,022	£247,057	£778,079	£1,042,626	£1,204,902	19.31
2012	£193,702	£945,720	£1,139,421	£1,526,824	£1,708,095	28.27
2013	£423,653	£539,195	£962,848	£1,290,217	£1,381,240	23.89
2014	£376,211	£706,687	£1,082,898	£1,451,084	£1,511,144	26.87
2015	£350,788	£488,977	£839,765	£1,125,285	£1,142,165	20.84

* where the additional spend required to support a full time equivalent job is taken to be **£54K**.

Source: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf

11. Age of respondents visiting the GKT

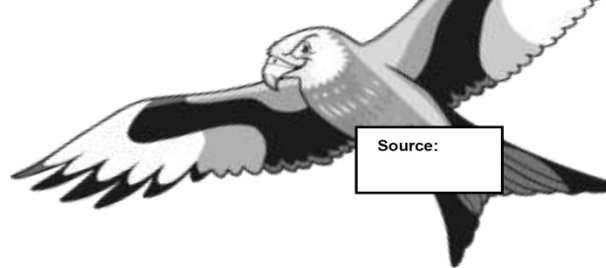
Year	<5	5 - 9	10 - 14	15 - 17	18 - 24	25- 34	35 - 44	45 - 54	55 - 64	65+
2004	5.00	4.00	3.00	0.00	1.00	6.00	11.00	26.00	24.00	20.00
2005	7.66	9.20	4.60	1.53	1.92	8.81	9.58	20.31	21.84	14.56
2006	10.32	2.49	4.27	1.42	4.63	1.42	3.20	16.01	23.84	32.38
2007	3.87	2.24	2.85	0.61	1.22	4.48	8.96	14.87	33.20	27.70
2008	1.00	1.70	9.00	3.00	2.70	3.20	11.70	15.70	28.60	23.40
2009	2.40	0.00	0.00	0.00	1.40	10.40	10.80	15.10	29.70	30.20
2010	2.86	5.71	6.12	7.76	8.16	2.86	6.53	13.88	28.57	17.55
2011	1.60	3.90	4.10	1.60	2.70	2.30	15.60	20.40	27.70	20.10
2012	2.10	2.40	10.50	1.70	2.10	5.20	11.40	14.30	30.50	19.80
2013	4.00	4.00	4.10	2.80	5.10	6.90	10.10	17.00	21.20	24.80
2014	3.57	4.11	7.14	3.24	3.35	3.78	10.92	20.32	22.81	20.76
2015	6.67	8.94	7.66	1.70	3.97	4.68	8.51	11.21	20.28	26.38

12. Number of visitor surveys per month on the GKT

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	total
No.	23	57	65	29	30	4	37	21	6	8	2	0	282
%	8.10	20.07	22.89	10.21	10.56	1.41	13.03	7.39	2.11	3.52	0.70	0.00	



Galloway Kite Trail Visitor Survey



Source:

We would be grateful if you could spend a moment to provide some information that will help in marketing as well as to find out how the trail benefits the local economy and people. This in turn will benefit the local red kite population. Thank you.

Q1) Please fill in the date that you visited Galloway Kite Trail:

d d	m m	y y y y
-----	-----	---------

Q2) What area do you usually live in?
Please tick one box.

Dumfries and Galloway	
Elsewhere in Scotland	
Ireland, Northern Ireland, England or Wales	
Elsewhere in Europe	
Outside Europe	

In which postcode do you normally live, if in the UK? (Write the name of the nearest major city if outside the UK):

Q3) Which of the following statements best describes you personally? **(Please tick one box only)**

I live within 10 miles of the Galloway Kite Trail	
I have come from home on a day trip to visit this area	
I am holidaying and staying in Dumfries & Galloway	
Holidaying out with D&G but made a day trip to this area	

If you live in Dumfries & Galloway please skip to Q8

Q4) Is this your first visit to Dumfries and Galloway?

Please tick box. Yes ☐ No ☐

Q5) Did the Galloway Kite Trail (or Galloway's red kites) influence your decision to visit Dumfries and Galloway? **Please tick one box.**

Main reason for visit	
One of the reasons for visit	
Did not influence your decision to visit / not sure	

Q6) Where are you staying currently?
Please tick one box.

Home	
Hotel	
Guest House/Bed and Breakfast	
Self Catering	
Caravan/Camping	
Visiting Friends/Relatives	

Please write name of nearest town/village you are currently staying at:

If you are staying at home please skip to Q8

Q7) By the time you leave, how many nights in total will you have stayed at your holiday location?

Number of nights

Q8) What were the main reasons that made you choose to visit Galloway Kite Trail. **Please tick one box only.**

General interest in Galloway Kite Trail	
Specific Interest in kites/birds of prey	
General Interest in birds/wildlife	
Walk in the countryside	
Place for a picnic	
Something to do	
Other	

If you have ticked other, please explain

.....

.....

Q9) How did you find out about the Galloway Kite Trail?
Please tick relevant box

Website / Facebook / Twitter (which one?)	<input type="checkbox"/>
Tourist Information Centre	<input type="checkbox"/>
Newspaper/Magazine	<input type="checkbox"/>
Word of mouth	<input type="checkbox"/>
Information at a local business	<input type="checkbox"/>
Other (e.g. radio, TV)	<input type="checkbox"/>
Road Signs	<input type="checkbox"/>
VisitScotland 'Explore Dumfries & Galloway' guide	<input type="checkbox"/>

Please provide more detail for the above (e.g. name, place, which publication or website?, source)

.....

.....

The next question asks how much you have spent or are likely to spend during your visit. Please note that this is important as it helps us to determine how beneficial the kites are to local communities, from the tourism generated.

PLEASE TURN OVER

(Please write to nearest GB pound)	<u>Estimate in £</u>
Entrance fee(s) (e.g. kite feeding)
Drinks, Meals & Snacks
Gifts & Souvenirs
Travel Fares & Fuel
Accommodation (for one night)
Other (any other spend)

You only ☐ Your party ☐

Q11) Please tick one box below, to show which age group and gender applies to **you:**

Age (years)	Please tick one box below	
	Male	Female
under 18		
18-25		
26-34		
35-44		
45-54		
55-59		
60-64		
65+		

Age (years)	How many of you are	
	Male	Female
under 5		
5-9		
10-14		
15-17		
18-25		
26-34		
35-44		
45-54		
55-59		
60-64		
65+		

11

11

--	--

.....

.....

.....

.....

.....

[illegible]

**GKT Community Liaison Officer.
RSPB Scotland,
The Old School,
Crossmichael,
Castle Douglas
DG7 3AP**



giving
nature
a home