

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. **681** visitors were interviewed in Argyll & The Isles and **177** visitors answered specific questions about their visit to the area via the follow-up online survey.



Iona Abbey is located on the Isle of Iona

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:

Argyll & The Isles (2015)

2,012,000 overnight visits

86% domestic visits

14% overseas visits

Top overseas markets: **Germany, USA, France, Netherlands, Australia**

£495m total visitor spend

Please note: due to different reporting regions, the volume and value data shown here includes Argyll, the Isles, Loch Lomond, Stirling and Trossachs (ALLST).



What attracted visitors to come...

Argyll & The Isles (top 10)

Base	177
1 The scenery & landscape	84%
2 To get away from it all	48%
3 The history & culture	45%
4 Holidayed here before and wanted to return	38%
5 A place I have always wanted to visit	35%
6 To visit family / friends who live there	27%
7 The range of activities available	26%
8 To visit a particular attraction	24%
9 Its reputation for friendly people	20%
10 It is easy to get to	15%

Scotland (top 10)

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

The scenery and landscape was the overwhelming draw for visitors to Argyll & The Isles, mentioned by 84%. Another key factor, responsible for attracting almost half of visitors to the area, was the idea of getting away from it all. In fact, Argyll & The Isles was one of the three top areas in Scotland for getting away from it all.

Other significant motivations for visiting the area were the history and culture (45%) and previous experience of visiting (38%). Almost a quarter mentioned that they came to visit a particular attraction; with Iona, Staffa and whisky distilleries being most commonly cited.



Activities undertaken

Argyll & The Isles (top 10)

	Base	177
1	Sightseeing by car / coach / on foot	79%
2	Short walk, stroll	61%
3	Visited a beach	57%
4	Visited a historic house, stately home, castle	50%
5	Visited a cathedral, church, abbey, other religious building	49%
6	Watched wildlife, bird watching	44%
7	Long walk, hike, ramble	43%
8	Visited a woodland / forest area	37%
9	Visited a country park / garden	34%
10	Visited a museum / art gallery	33%

Scotland (top 10)

	Base	2999
1	Sightseeing by car / coach / on foot	74%
2	Visited a historic house, stately home, castle	60%
3	Short walk / stroll	54%
4	Shopping	46%
5	Visited a cathedral, church, abbey, other religious building	46%
6	Visited a museum / art gallery	45%
7	Centre based walking	45%
8	Visited a country park / garden	43%
9	Visited cities	42%
10	Long walk, hike, ramble	38%

Sightseeing was the most popular activity in Argyll & The Isles undertaken by almost four-fifths of visitors.

Outdoor activities featured more prominently in this area than in others with visitors significantly more likely than average to take a short walk (61%), visit a beach (57%), watch birds or wildlife (44%), visit forests or woodlands (37%) or go fishing (7%).

Just over 1 in 10 visitors to Argyll & The Isles mentioned attending Highland Games (12%).



Type of accommodation stayed in

Argyll & The Isles (top 5)

	Base	177
1	B&B / Guest House / Restaurant with Rooms	33%
2	Self-catering	33%
3	Hotel	29%
4	Friends / family	14%
5	Camping	11%

Scotland (top 5)

	Base	2999
1	Hotel	41%
2	Self-catering	22%
3	B&B / Guest House / Restaurant with Rooms	20%
4	Friends / family	19%
5	Camping	6%

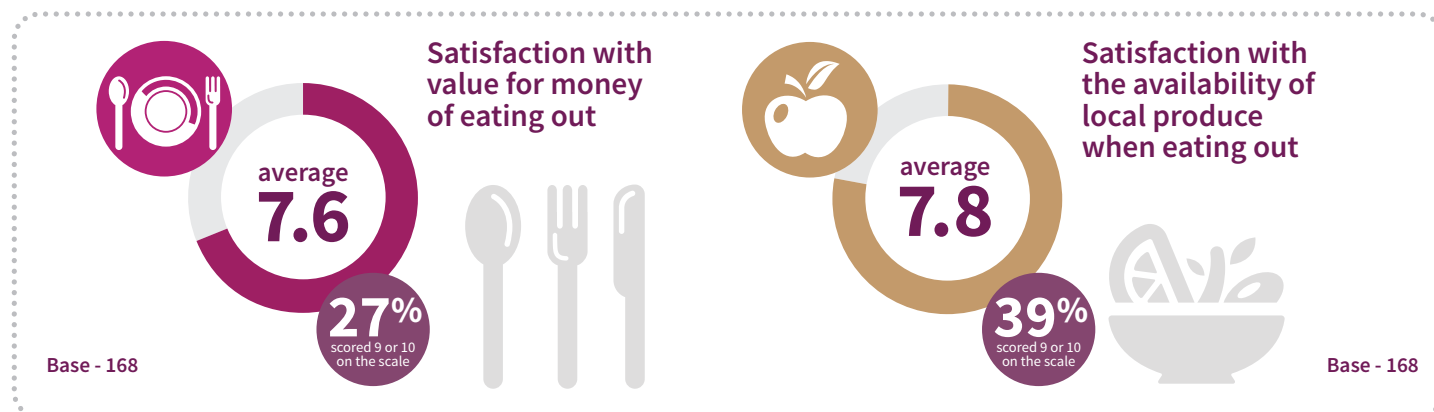
Guest houses and B&Bs along with self-catering were the most popular forms of accommodation in Argyll & The Isles with a third of visitors staying in each type. 29% of visitors stayed in hotels - a lower proportion than in many regions of Scotland.

Camping and caravanning were more common in this area than average with just over 1 in 10 visitors camping and a further 8% in touring caravans & motorhomes.

Visitors were asked to rate various aspects of their visitor experience in Argyll & The Isles on a scale of 1 to 10 (with 1 being extremely dissatisfied through to 10 as extremely satisfied).

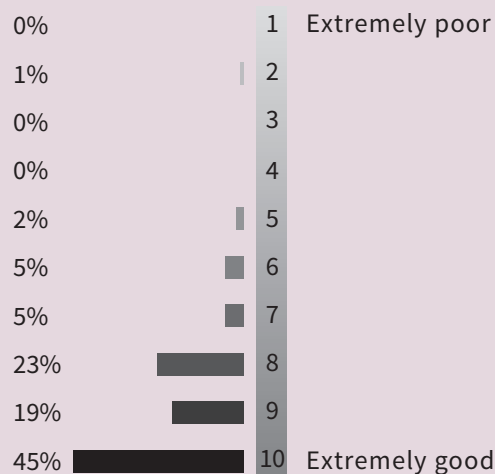
Satisfaction with the service provided and knowledge of staff were the highest rated of the accommodation measures in Argyll & The Isles. Visitors were also positive about the ease of getting around the area, and the value for money of attractions.

The aspects of the visitor experience where Argyll and the Isles performed particularly well related to eating out, with visitors giving above average scores for the availability of local produce and value for money aspects.

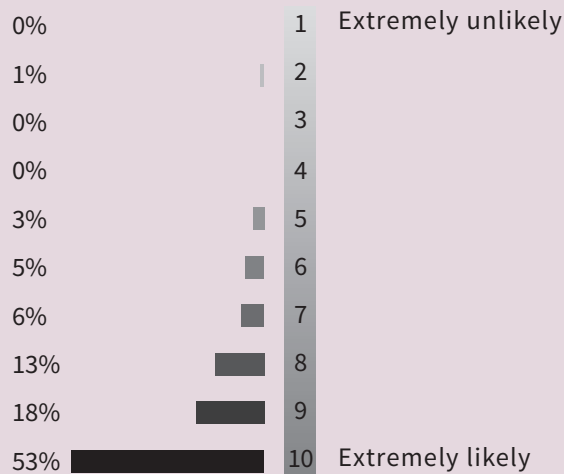




Your overall experience?

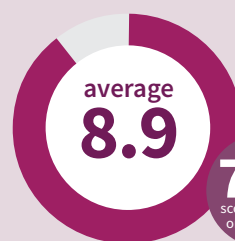


How likely are you to recommend?



Base - 177

64%
scored 9 or 10
on the scale

average
8.8

71%
scored 9 or 10
on the scale

Base - 177

Argyll & The Isles was rated highly for overall visitor experience with 92% giving a satisfaction score of 7 or more out of 10. Almost two-thirds of visitors gave a 9 or 10 out of 10 score showing the highest levels of satisfaction with their trip. 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.

Visitors also indicated a high likelihood to recommend Argyll & The Isles as a holiday destination to family or friends with 90% giving scores of 7-10 on the scale. 71% scored 9 or 10 out of 10, demonstrating a very strong intention to recommend the area, reinforcing the positive visitor experience enjoyed in Argyll & The Isles.

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.