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, 290 overnight visitors to Argyll & the Isles completed the online survey. The results shown below are based on these visitors to Argyll & the Isles.

Profile of overnight visitors to Argyll & the Isles

55% Domestic visitors
- 16% Scotland (residents)
- 39% Rest of UK

45% International visitors
- 16% Europe
- 28% Long haul including:
  - 22% North America
  - 6% Australasia
  - 1% Rest of World

Average number in travel party: 2.6
Children (under 16) in party: 12%

Life Stage
- Pre-nesters: 6%
- Families: 11%
- Older Independents: 52%
- Retirement Age: 31%

Profile of trip

Argyll & the Isles visitors stayed on average
- 11 nights in total in Scotland including
- 3.5 nights in Argyll & the Isles

15% of visitors to Argyll & the Isles stayed in a single coastal location (i.e. did not stay elsewhere)

First time visitor: 31%
Repeat visitor: 69%

Average proportion of first-time visitors to Scotland: 25% (Scotland-wide sample)

Examples of Type of Trip

A trip of a lifetime: 14%
A special holiday/short break: 22%
Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Argyll &amp; the Isles sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>89%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>60%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>31%</td>
</tr>
<tr>
<td>4</td>
<td>Scotland’s people</td>
<td>27%</td>
</tr>
<tr>
<td>5</td>
<td>A Scottish attraction</td>
<td>22%</td>
</tr>
<tr>
<td>6</td>
<td>Scotland’s food and drink</td>
<td>20%</td>
</tr>
<tr>
<td>7</td>
<td>My or my family’s Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<td>A particular experience found in Scotland</td>
<td>11%</td>
</tr>
<tr>
<td>9</td>
<td>Visiting friends or family</td>
<td>11%</td>
</tr>
<tr>
<td>10</td>
<td>An event or festival</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: All visitors to Argyll & the Isles (stage 2) 290

<table>
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<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Scotland-wide sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>70%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>48%</td>
</tr>
<tr>
<td>3</td>
<td>Outdoor activities available</td>
<td>27%</td>
</tr>
<tr>
<td>4</td>
<td>Visiting friends or family</td>
<td>22%</td>
</tr>
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<td>5</td>
<td>Scotland’s people</td>
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<td>7</td>
<td>My or my family’s Scottish ancestry</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<td>Scotland’s food and drink</td>
<td>15%</td>
</tr>
<tr>
<td>9</td>
<td>It’s easy to get to or close to home</td>
<td>15%</td>
</tr>
<tr>
<td>10</td>
<td>An event or festival</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All visitors to Scotland (stage 2) 3,011

Type of accommodation used in Argyll & the Isles

- **55% stayed in serviced accommodation**
  - 31% Hotel, motel, inn
  - 22% Guest house, B&B
  - 3% Serviced apartment

- **49% stayed in non-serviced accommodation**
  - 24% Self-catering/commercial non-serviced rentals
  - 22% Camping, caravan, motorhome
  - 4% Friend’s or relative’s home

Base: Stage 2 Argyll & the Isles visitors (priority region) 209

Note: serviced and non-serviced adds to more than 100% due to some people staying in more than one accommodation type.

Satisfaction with accommodation in Argyll & the Isles

**Satisfaction with...** (Scored out of 10)

- **Overall welcome provided to you**
  - Average 8.85
  - 65% 9 or 10 out of 10
  - Scotland-wide sample 62% (9 or 10 out of 10)

- **The knowledge of staff/host (at accommodation) about things to do in the area**
  - Average 8.57
  - 56% 9 or 10 out of 10
  - Scotland-wide sample 53% (9 or 10 out of 10)

- **The value for money of accommodation**
  - Average 7.81
  - 36% 9 or 10 out of 10
  - Scotland-wide sample 42% (9 or 10 out of 10)

Base: Stage 2 Argyll & the Isles visitors in paid for accommodation excluding n/a 240 - 274
Local Area Factsheet: Argyll & the Isles

Attractions and activities undertaken in Argyll & the Isles

Top 5 attractions or activities undertaken/visited in Argyll & the Isles

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Argyll &amp; the Isles</th>
<th>Argyll &amp; the Isles sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>46%</td>
</tr>
<tr>
<td>2</td>
<td>Shopping</td>
<td>30%</td>
</tr>
<tr>
<td>3</td>
<td>Viewed architecture and buildings</td>
<td>28%</td>
</tr>
<tr>
<td>4</td>
<td>A visitor or heritage centre</td>
<td>26%</td>
</tr>
<tr>
<td>5</td>
<td>A hill walk, mountaineering, hike or ramble</td>
<td>26%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractons in Argyll & the Isles 202

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

Base: Took part in activities/attractons in Scotland 3,011

Satisfaction with attractions in Argyll & the Isles

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions: Average 8.94

Quality of experience at attractions: Average 8.62

Value for money of paid for attractions: Average 8.18

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

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

Scotland-wide sample 47% (9 or 10 out of 10)

Base: Stage 2 Took part in activities/attractons in Argyll & the Isles excluding n/a 187 - 193

Food and drink experiences in Argyll & the Isles

24% took part in food and/or drink experiences in Argyll & the Isles

Key food and drink experiences included:

- 9% visited a fine dining restaurant
- 7% visited a farm shop/farmers market
- 4% undertook a food or drink activity e.g. cookery class

Base: Stage 2 Took part in activities/attractons in Argyll & the Isles 202
Satisfaction with food and drink experiences in Argyll & the Isles

**Satisfaction with…... (Scored out of 10)**

**Average 8.49**
- The service provided by staff
- Scotland-wide sample 55%

49%
- 9 or 10 out of 10

**Average 8.18**
- The quality of food and drink available
- Scotland-wide sample 48%

43%
- 9 or 10 out of 10

**Average 8.00**
- The availability of local produce when eating out
- Scotland-wide sample 37%

33%
- 9 or 10 out of 10

**Average 7.68**
- The value for money of eating out
- Scotland-wide sample 32%

27%
- 9 or 10 out of 10

*Base: Stage 2 Argyll & the Isles visitors excluding n/a 275-285*

Overall experience and likelihood to recommend Argyll & the Isles

**Positive rating of holiday/short break experience**
(9 or 10 out of 10)

72% Argyll & the Isles
71% for Scotland overall
(Scotland-wide sample)

**Likelihood to recommend as a holiday/short break destination**
(9 or 10 out of 10)

82% Argyll & the Isles
82% for Scotland overall
(Scotland-wide sample)

*Base: Stage 2 Argyll & the Isles visitors (priority region) 209*
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 290 is used this includes all visitors who stayed in Argyll & the Isles during their trip. Where the base size is 209 this shows results for the visitors who were allocated Argyll & the Isles 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.
- The following questionnaire wording was used to describe the area: Argyll & the Isles (e.g. Oban, Mull, Islay, Loch Fyne, Crianlarich, Campbeltown)
- 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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