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, 158 overnight visitors to Ayrshire & Arran completed the online survey. The results shown below are based on these visitors to Ayrshire & Arran.

Profile of overnight visitors to Ayrshire & Arran

81% Domestic visitors

- 18% Scotland (residents)
- 63% Rest of UK

19% International visitors

- 4% Europe
- 14% Long haul including:
  - 9% North America
  - 5% Australasia

Average number in travel party: 2.7

Children (under 16) in party: 19%

Life Stage

- Pre-nesters: 5%
- Families: 18%
- Older Independents: 44%
- Retirement Age: 33%

Profile of trip

Ayrshire & Arran visitors stayed on average
- 8.8 nights in total in Scotland including
- 4.6 nights in Ayrshire & Arran

26% of visitors to Ayrshire & Arran stayed in one coastal location

First time visitor: 11%
Repeat visitor: 89%

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

Examples of Type of Trip

- A trip of a lifetime: 6%
- A special holiday/short break: 16%
Reasons for choosing Scotland

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Ayrshire &amp; Arran sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The scenery and landscape</td>
<td>77%</td>
</tr>
<tr>
<td>2</td>
<td>The history and culture</td>
<td>46%</td>
</tr>
<tr>
<td>3</td>
<td>Visiting friends or family</td>
<td>27%</td>
</tr>
<tr>
<td>4</td>
<td>My or my family’s Scottish ancestry</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
<td>Scotland’s people</td>
<td>22%</td>
</tr>
<tr>
<td>6</td>
<td>A Scottish attraction</td>
<td>22%</td>
</tr>
<tr>
<td>7</td>
<td>Outdoor activities available</td>
<td>20%</td>
</tr>
<tr>
<td>8</td>
<td>It’s easy to get to or close to home</td>
<td>18%</td>
</tr>
<tr>
<td>9</td>
<td>Scotland’s food and drink</td>
<td>13%</td>
</tr>
<tr>
<td>10</td>
<td>A personal event</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: All visitors to Ayrshire & Arran (stage 2)  

<table>
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<th>Rank</th>
<th>Top ten reasons for choosing Scotland</th>
<th>Scotland-wide sample</th>
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</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>
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<td>3</td>
<td>Outdoor activities available</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)  

Type of accommodation used in Ayrshire & Arran

31% stayed in serviced accommodation
- 25% Hotel, motel, inn
- 4% Guest house, B&B
- 1% Serviced apartment

69% stayed in non-serviced accommodation
- 25% Self-catering/commercial non-serviced rentals
- 25% Camping, caravan, motorhome
- 17% Friend’s or relative’s home

Satisfaction with accommodation in Ayrshire & Arran

Satisfaction with... (Scored out of 10)

- Overall welcome provided to you: Average 8.63, 59% 9 or 10 out of 10
- Average 8.31, 48% 9 or 10 out of 10
- Average 8.09, 46% 9 or 10 out of 10

Scotland-wide sample
- Overall welcome provided to you: 62% (9 or 10 out of 10)
- The knowledge of staff/host (at accommodation) about things to do in the area: 53% (9 or 10 out of 10)
- The value for money of accommodation: 42% (9 or 10 out of 10)

Base: Stage 2 Ayrshire & Arran visitors in paid for accommodation excluding n/a 117-134
Attractons and activities undertaken in Ayrshire & Arran

Top 5 attractions or activities undertaken/visited in Ayrshire & Arran

<table>
<thead>
<tr>
<th>Rank</th>
<th>Attractions and activities undertaken in Ayrshire &amp; Arran</th>
<th>Ayrshire &amp; Arran sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A castle or fort</td>
<td>51%</td>
</tr>
<tr>
<td>2</td>
<td>A historic house, palace, stately home</td>
<td>49%</td>
</tr>
<tr>
<td>3</td>
<td>A country park or garden</td>
<td>48%</td>
</tr>
<tr>
<td>4</td>
<td>Shopping</td>
<td>45%</td>
</tr>
<tr>
<td>5</td>
<td>A visitor or heritage centre</td>
<td>36%</td>
</tr>
</tbody>
</table>

Base: Took part in activities/attractions in Ayrshire & Arran

<table>
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<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/attractions in Scotland

Satisfaction with attractions in Ayrshire & Arran

Satisfaction with… (Scored out of 10)

- Knowledge and passion of the staff at attractions: Average 8.98
  - 70% 9 or 10 out of 10
  - Scotland-wide sample 64% (9 or 10 out of 10)

- Quality of experience at attractions: Average 8.88
  - 65% 9 or 10 out of 10
  - Scotland-wide sample 57% (9 or 10 out of 10)

- Value for money of paid for attractions: Average 8.64
  - 57% 9 or 10 out of 10
  - Scotland-wide sample 47% (9 or 10 out of 10)

Base: Stage 2 Took part in activities/attractions in Ayrshire & Arran excl. n/a110-112

Food and drink experiences in Ayrshire & Arran

34% took part in food and/or drink experiences in Ayrshire & Arran

Key food and drink experiences included:
- 26% visited a farm shop/farmers market
- 5% visited a fine dining restaurant
- 4% undertook a food or drink activity e.g. cookery classes

Base: Stage 2 Took part in activities/attractions in Ayrshire & Arran 122
Satisfaction with food and drink experiences in Ayrshire & Arran

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

- **The service provided by staff**
  - Average 8.58
  - 54% 9 or 10 out of 10
  - Scotland-wide sample 55%

- **The quality of food and drink available**
  - Average 8.34
  - 48% 9 or 10 out of 10
  - Scotland-wide sample 48%

- **The availability of local produce when eating out**
  - Average 7.99
  - 38% 9 or 10 out of 10
  - Scotland-wide sample 37%

- **The value for money of eating out**
  - Average 7.92
  - 34% 9 or 10 out of 10
  - Scotland-wide sample 32%

**Base: Stage 2 Ayrshire & Arran visitors excl. n/a 144-151**

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**Overall experience and likelihood to recommend Ayrshire & Arran**

- **Positive rating of holiday/short break experience**
  - (9 or 10 out of 10)
  - 72% Ayrshire & Arran
  - 71% for Scotland overall
  - (Scotland-wide sample)

- **Likelihood to recommend as a holiday/short break destination**
  - (9 or 10 out of 10)
  - 80% Ayrshire & Arran
  - 82% for Scotland overall
  - (Scotland-wide sample)

**Base: Stage 2 Ayrshire & Arran visitors (priority region) 127**
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 158 is used this includes all visitors who stayed in Ayrshire & Arran during their trip. Where the base size is 127 this shows results for the visitors who were allocated Ayrshire & Arran 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:
  Ayrshire (e.g. Alloway, Troon, Largs), The Isle of Arran
- 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 on visitscotland.org for more information on this survey.

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