



Insight Department:
Ayrshire and Arran Factsheet | 2019

Published: January 2021



Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Ayrshire and Arran region including East Ayrshire, North Ayrshire and South Ayrshire council areas. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution. To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on visitscotland.org and indicate changes in tourism performance over time. Yet, it is recommended to refer to the 3-year average figures on page 3 when analysing volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Some domestic figures are also available at local authority level, and these have been provided in addition to the wider regional results where sample size allows.

This report starts with an **overall** evaluation of Ayrshire and Arran tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Overall Tourism in Ayrshire & Arran

Latest Figures

Dumfries House and Estate, East Ayrshire
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Overall Tourism Summary: Visits, Nights and Spend in Ayrshire & Arran, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (000s)	% Change 2016-18/2017-19	2017-19 Average (£m)	% Change 2016-18/2017-19
Europe	37	-8%	177	+10%	16	-6%
North America	27	-13%	182	-9%	18	-12%
Rest of World	18	+13%	162	-12%	15	-10%
Total International Overnight	81	-7%	520	-5%	50	-9%
Scotland	405	+1%	1,345	+2%	73	-5%
Rest of Great Britain	256	0%	1,115	-1%	66	-16%
Total Domestic Overnight	661	+1%	2,460	+1%	139	-10%
Total Overnight Tourism	742	0%	2,980	0%	189	-10%
Total Day Tourism	10,448	-2%	N/A	N/A	415	+7%
Grand Total	11,190	-2%	2,980	0%	604	+1%

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Ayrshire & Arran

Tourism Performance | 2019

Annual visitor statistics suggest that in 2019 overnight trips and expenditure in Ayrshire and Arran decreased from 2018 when they were the highest in half a decade. The 2017-2019 period showed **no changes** in the number of **overnight trips** or **bednights** compared to 2016-2018; however, associated **spend decreased**.

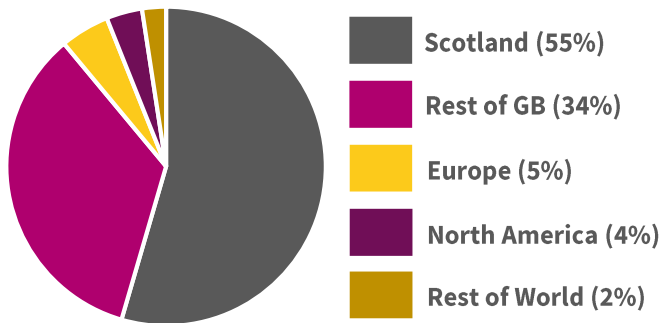
Between 2017 and 2019, visitors made nearly **750,000 overnight trips** per year to Ayrshire and Arran, spending **3 million nights** annually in the region. Overnight tourism expenditure was **£189 million** per year on average, a 10% drop from 2016-2018 which resulted from decreases in both domestic and international spend.

The vast majority of trips to the region were undertaken by **British** travellers – **89% of all trips** in 2017-2019. Domestic visitors also accounted for **three quarters of all overnight spend** in Ayrshire and Arran over the same period.

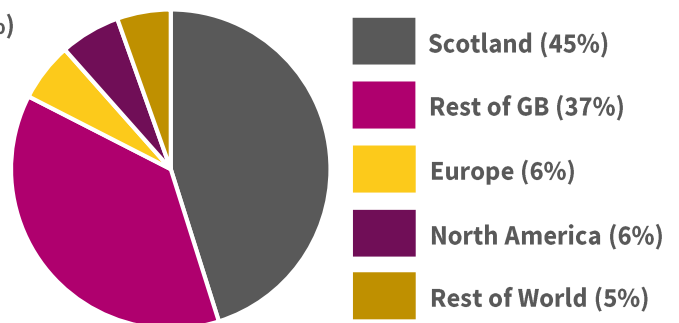
There were **no significant changes to the regions' visitor mix**. Very slight increases in domestic visits and bednights in 2017-2019 – driven by Scottish residents – were sufficient to offset a 7% drop in international travellers. Yet, domestic expenditure also declined from 2016-2018, mostly due to the lower spend of English visitors.

At 10.4 million per year in 2017-2019, domestic **day tourism trips** in Ayrshire and Arran **declined** by 2%, mirroring a similar drop observed on national level. However, **day spend increased** by 7% to reach £415 million annually, thus producing net growth in tourism expenditure.

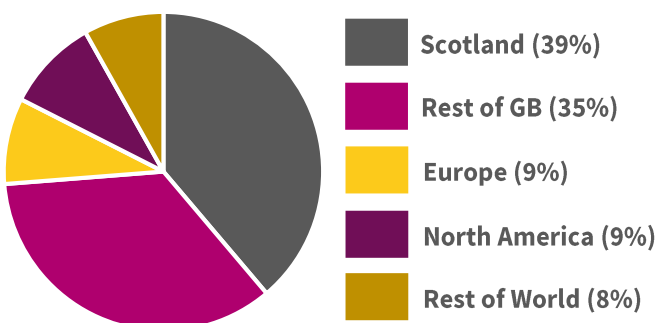
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

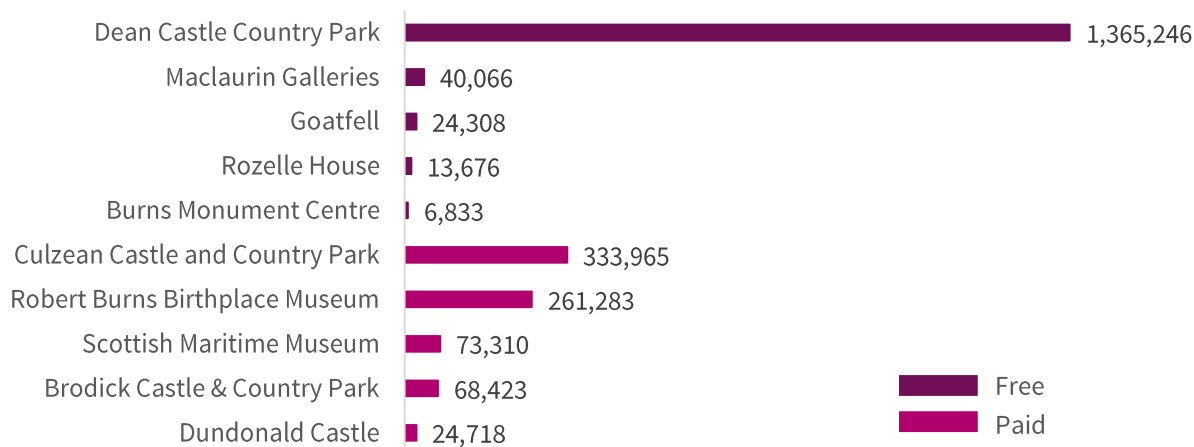
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
East Ayrshire	283	0%	2.8	+8%	50.2	-8%
North Ayrshire	407	+3%	4.4	+7%	86.8	+8%
South Ayrshire	389	0%	5.8	+4%	121.5	-13%
Ayrshire & Arran	1,079	+1%	13.0	+6%	258.5	-6%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Ayrshire & Arran (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Occupancy Rates by Accommodation Type and Month, Ayrshire & Arran 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	48%	70%	72%	78%	83%	82%	85%	81%	82%	73%	71%	51%	73%
Guest House/B&B (Room Occ.)	N/A	N/A	8%	25%	47%	47%	72%	45%	27%	30%	19%	6%	34%
Self-Catering (Unit Occ.)	39%	36%	41%	44%	46%	59%	60%	64%	62%	65%	58%	46%	51%
Hostel (Bed Occ.)	7%	26%	31%	51%	59%	56%	61%	68%	47%	36%	N/A	78%	47%

Source: SAOS, 2019.

II. International Visitors to Ayrshire & Arran

Overnight Tourism

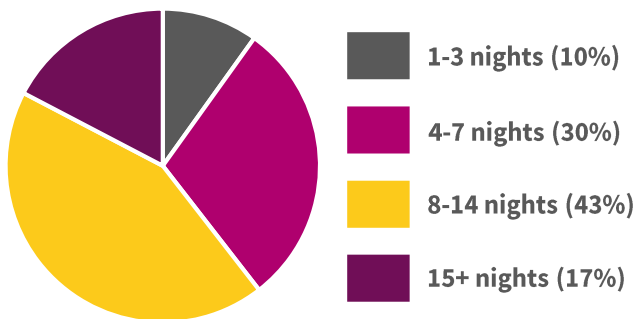
Figures suggest a **significant decline in international tourism** to Ayrshire and Arran in 2019. Visits are estimated to have been just over 60,000, and spend £24 million. 2019 international figures are based on lower sample size, so it is recommended to also refer to the 3-year average column when evaluating changes in tourism performance. Between 2017 and 2019, most international visitors to Ayrshire and Arran travelled for a **holiday**, while a third visited friends and family. The region enjoyed a high average length of stay, with **three in five** overseas residents staying **longer than a week**. While summer remained the busiest season, its popularity in 2017-2019 declined, while winter and spring travel grew.

International Tourism Performance, 2019 and 2017-19 Annual Average Figures

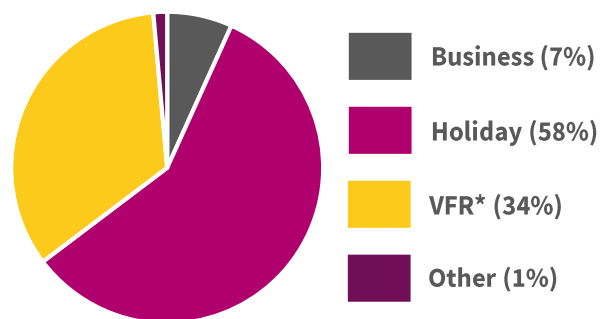
Indicators	Scotland		Ayrshire & Arran			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19*	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	61	-42%	81	-7%
Spend (£M)	2,538	+7%	24	-70%	50	-9%
Nights (000s)	27,385	+8%	382	-38%	520	-5%
Average length of stay	7.9 nights	+16%	6.3 nights	+7%	6.4 nights	+2%
Average spend per day	£93	0%	£63	-51%	£95	-5%
Average spend per visit	£734	+15%	£394	-48%	£612	-3%

Source: IPS, 2019. *2019 Ayrshire & Arran data is based on relatively low sample size.

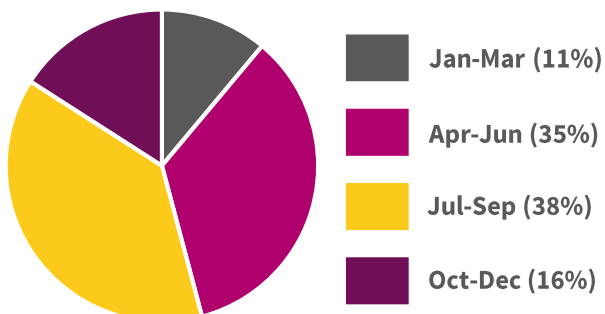
Duration of Stay



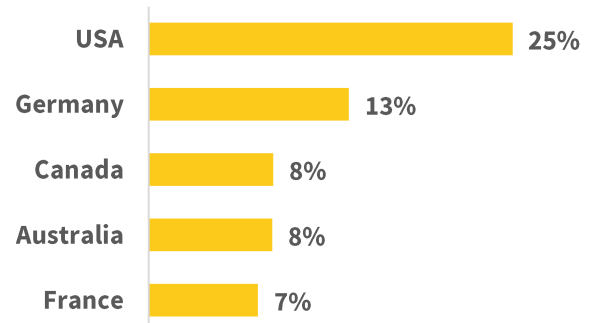
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019).

*VFR = Visiting friends or relatives.

III. Domestic Visitors to Ayrshire & Arran

Overnight Tourism

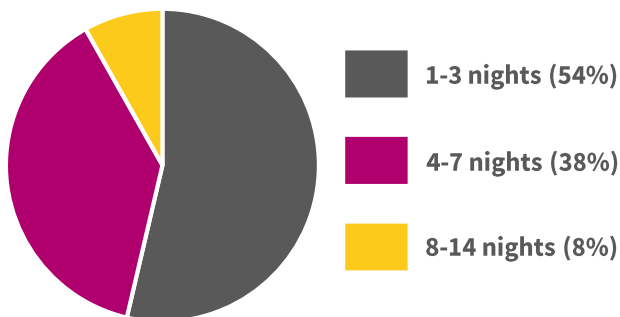
In 2019, domestic visitors to Ayrshire and Arran also declined in numbers, although figures indicate this was to a lesser extent than international visitors. **Trips decreased by 9%** due to a drop in holiday travel, while **bednights and total expenditure each fell by a fifth** from 2018. As a result, the region accounted for 4.5% of the domestic overnight trips and 3.8% of the domestic tourism spend in Scotland in 2019. This also signals a drop in domestic visitors' average length of stay; however, this remained above the national average at **3.6 nights**. Two-thirds of all domestic visits between 2017 and 2019 were holiday trips. Autumn visits became slightly more popular while winter and summer travel experienced a drop.

Domestic Overnight Tourism Performance, 2019 and 2017-19 Annual Average Figures

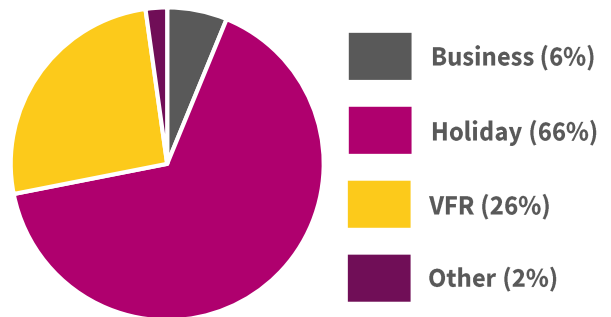
Indicators	Scotland		Ayrshire & Arran			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	626	-9%	661	+1%
Spend (£M)	3,200	+16%	121	-21%	139	-10%
Nights (000s)	46,413	+15%	2,227	-20%	2,460	+1%
Average length of stay	3.4 nights	-2%	3.6 nights	-12%	3.7 nights	0%
Average spend per day	£69	+1%	£54	-2%	£57	-11%
Average spend per visit	£232	-1%	£193	-13%	£211	-11%

Source: GBTS, 2019.

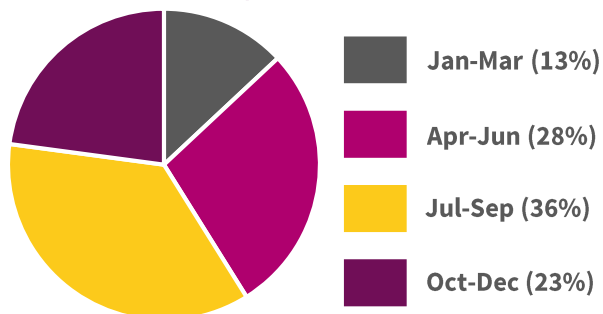
Duration of Stay



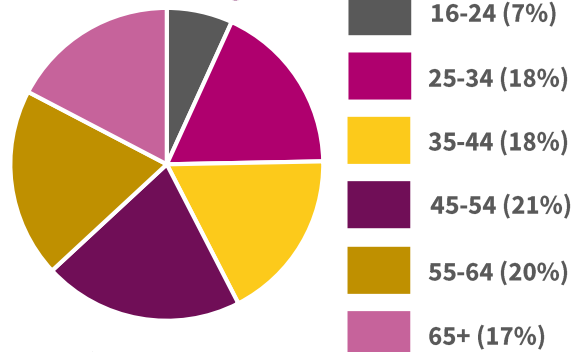
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.

Domestic Day Visits to Ayrshire & Arran

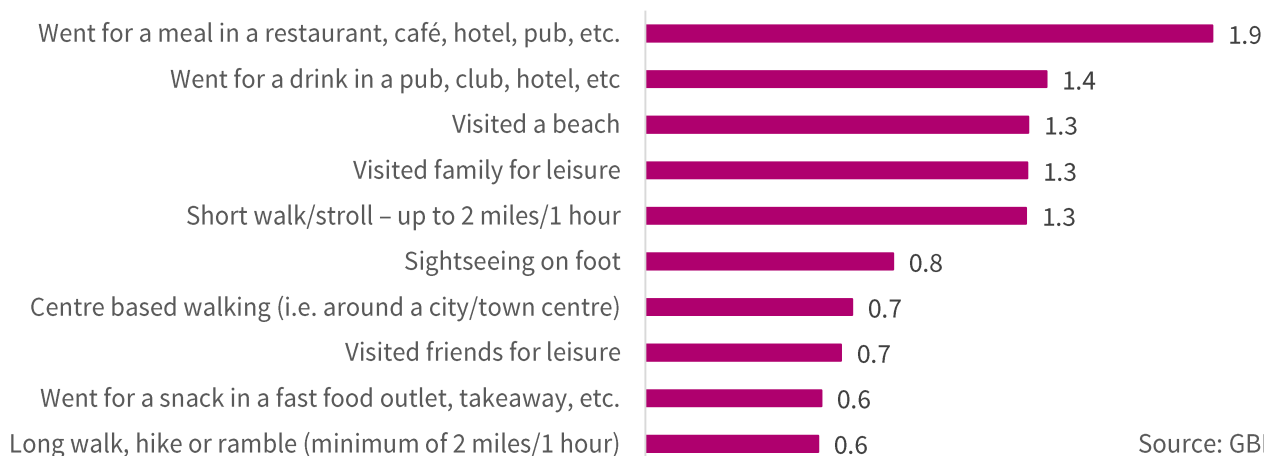
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Ayrshire & Arran	10.4	-2%	415	+7%
East Ayrshire	1.6	+1%	36	-15%
North Ayrshire	2.9	-9%	95	-9%
South Ayrshire	5.9	+1%	284	+17%

Source: GBDVS. Figures may not sum up due to rounding.

Most Popular Activities Undertaken as Part of a Day Trip, Ayrshire & Arran: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.

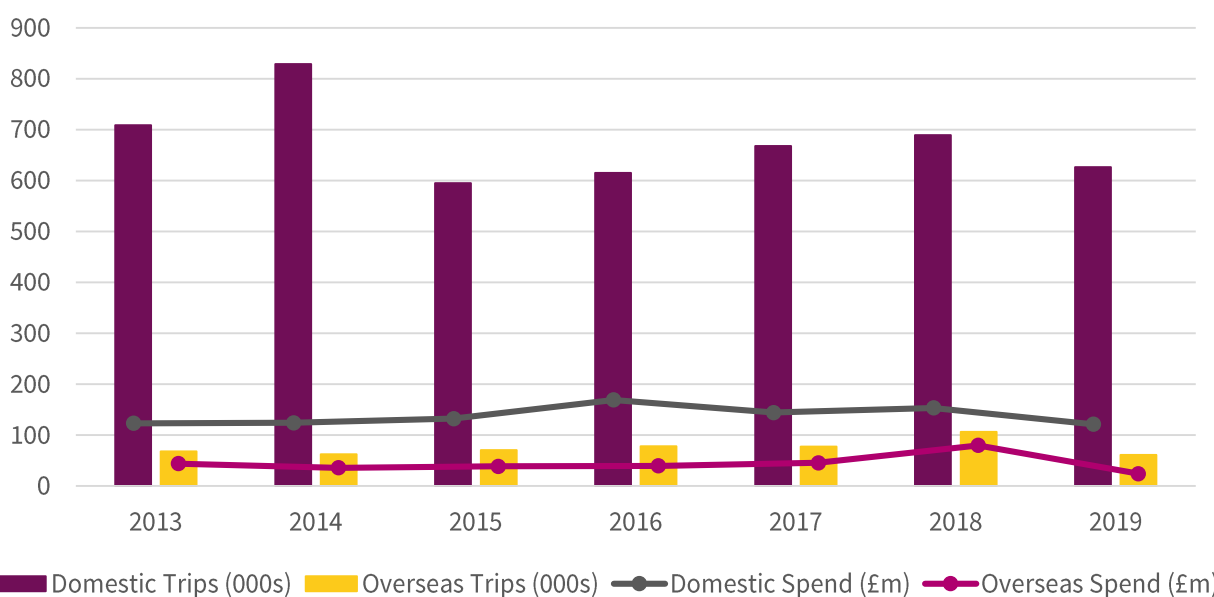


Visitors to Ayrshire & Arran

Historical Trend Information | 2013 - 2019

In terms of number of trips, 2019 performance was similar to that of 2016. The total **overnight visits** to Ayrshire and Arran were nearly 700,000, or **10% below** the annual average for the **2013-2018 period**. Total overnight tourism **expenditure** in the region was the **lowest in seven years**. At £145 million, it stands at 23% below the average for 2013-2018. After increasing for three consecutive years, in 2019 domestic trips declined for the first time since 2015, while associated tourism expenditure dropped to 2013/2014 levels. In 2019, international visits and expenditure in Ayrshire and Arran were both the lowest in a decade.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	709	829	595	615	668	689	626
International (000s)	68	62	70	78	77	106	61
Total Overnight (000s)	777	891	665	693	745	795	687

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	123	124	132	169	144	153	121
International (£m)	44	35	38	39	45	80	24
Total Overnight (£m)	167	159	170	208	189	233	145

Sources: GBTS, IPS.

Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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