


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

Base: Stage 2 online survey Argyll and the Isles visitors 290



Average number in travel party: 2.6

Children (under 16) in party: 12%

Base: Stage 2 online survey Argyll and the Isles visitors 290

Life Stage

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

Base: Stage 2 online survey Argyll and the Isles visitors excluding n/a 286

Profile of trip



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

Base: Stage 2 online survey Argyll & the Isles visitors 290



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)

Base: Stage 2 online survey Argyll & the Isles visitors 290

Examples of Type of Trip

- A trip of a lifetime: 14%
- A special holiday/short break: 22%

Base: Stage 2 Argyll & the Isles visitors excl. Scotland residents 264

Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Argyll & the Isles sample
1	The scenery and landscape	89%
2	The history and culture	60%
3	Outdoor activities available	31%
4	Scotland's people	27%
5	A Scottish attraction	22%
6	Scotland's food and drink	20%
7	My or my family's Scottish ancestry	16%
8	A particular experience found in Scotland	11%
9	Visiting friends or family	11%
10	An event or festival	11%
Base: All visitors to Argyll & the Isles (stage 2)		290

Rank	Top ten reasons for choosing Scotland	Scotland-wide sample
1	The scenery and landscape	70%
2	The history and culture	48%
3	Outdoor activities available	27%
4	Visiting friends or family	22%
5	Scotland's people	21%
6	A Scottish attraction	19%
7	My or my family's Scottish ancestry	16%
8	Scotland's food and drink	15%
9	It's easy to get to or close to home	15%
10	An event or festival	9%
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

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.

49% stayed in non-serviced accommodation



24%

Self-catering/
commercial non-serviced rentals



22%

Camping, caravan,
motorhome

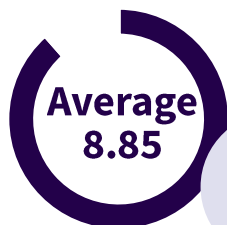


4%

Friend's or
relative's home

Satisfaction with accommodation in Argyll & the Isles

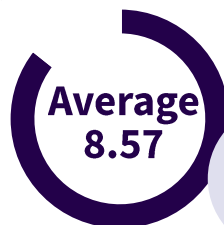
Satisfaction with... (Scored out of 10)



65%
9 or 10
out of 10

Overall welcome provided to you

Scotland-wide sample **62%**
(9 or 10 out of 10)



56%
9 or 10
out of 10

The knowledge of staff/host (at accommodation) about things to do in the area

Scotland-wide sample **53%**
(9 or 10 out of 10)



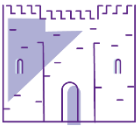
36%
9 or 10
out of 10

The value for money of accommodation

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

Attractions and activities undertaken in Argyll & the Isles



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

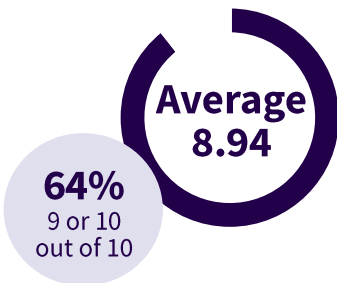
Rank	Attractions and activities undertaken in Argyll & the Isles	Argyll & the Isles sample
1	A castle or fort	46%
2	Shopping	30%
3	Viewed architecture and buildings	28%
4	A visitor or heritage centre	26%
5	A hill walk, mountaineering, hike or ramble	26%
Base: Took part in activities/attractions in Argyll & the Isles		202

Rank	Attractions and activities undertaken in Scotland	Scotland-wide sample
1	A castle or fort	59%
2	Viewed architecture and buildings	52%
3	A museum or art gallery	50%
4	A historic house, palace, stately home	49%
5	Shopping	47%
Base: Took part in activities/attractions 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



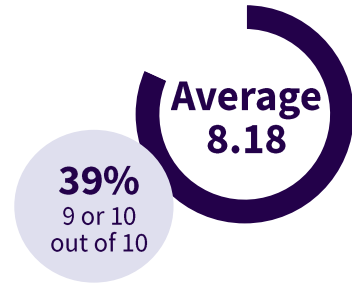
Scotland-wide sample 64% (9 or 10 out of 10)

Quality of experience at attractions



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

Value for money of paid for attractions



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

Base: Stage 2 Took part in activities/attractions 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

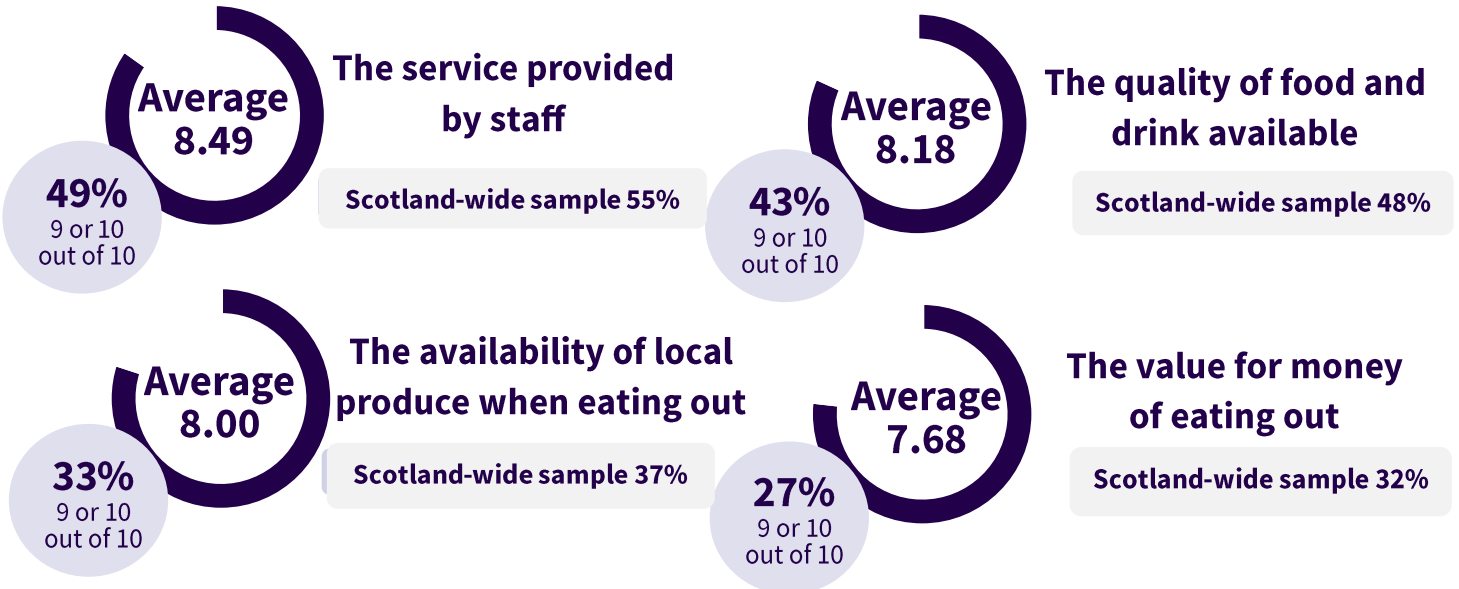
Key food and drink experiences included:

- 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/attractions in Argyll & the Isles 202

Satisfaction with food and drink experiences in Argyll & the Isles

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



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

Overall experience and likelihood to recommend Argyll & the Isles



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, Campbelltown)
- 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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Contact Us:

Insight Department

VisitScotland

[visitscotland.org](#) [visitscotland.com](#)

research@visitscotland.com

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