

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

Base: Stage 2 online survey Ayrshire & Arran visitors 158



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%

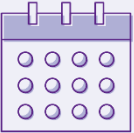
Base: Stage 2 online survey Ayrshire & Arran visitors 158

Life Stage

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

Base: Stage 2 online survey Ayrshire & Arran visitors excluding n/a 156

Profile of trip



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

Base: Stage 2 online survey Ayrshire & Arran visitors 158



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)

Base: Stage 2 online survey Ayrshire & Arran visitors 158

Examples of Type of Trip

- A trip of a lifetime: 6%
- A special holiday/short break: 16%

Base: Stage 2 Ayrshire & Arran visitors excluding Scotland residents 135

Reasons for choosing Scotland

Rank	Top ten reasons for choosing Scotland	Ayrshire & Arran sample
1	The scenery and landscape	77%
2	The history and culture	46%
3	Visiting friends or family	27%
4	My or my family's Scottish ancestry	22%
5	Scotland's people	22%
6	A Scottish attraction	22%
7	Outdoor activities available	20%
8	It's easy to get to or close to home	18%
9	Scotland's food and drink	13%
10	A personal event	8%
Base: All visitors to Ayrshire & Arran (stage 2)		158

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 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



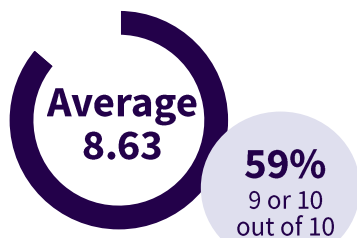
17%

Friend's or
relative's home

Base: Stage 2 online survey Ayrshire & Arran visitors (priority region) 127

Satisfaction with accommodation in Ayrshire & Arran

Satisfaction with... (Scored out of 10)



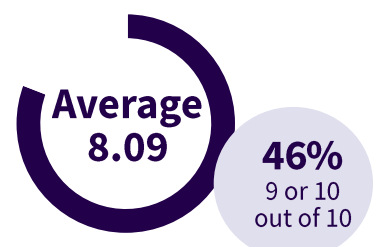
Overall welcome provided to you

Scotland-wide sample **62%**
(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)

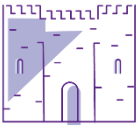


The value for money of accommodation

Scotland-wide sample **42%**
(9 or 10 out of 10)

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

Attractions and activities undertaken in Ayrshire & Arran



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

Rank	Attractions and activities undertaken in Ayrshire & Arran	Ayrshire & Arran sample	Rank	Attractions and activities undertaken in Scotland	Scotland-wide sample
1	A castle or fort	51%	1	A castle or fort	59%
2	A historic house, palace, stately home	49%	2	Viewed architecture and buildings	52%
3	A country park or garden	48%	3	A museum or art gallery	50%
4	Shopping	45%	4	A historic house, palace, stately home	49%
5	A visitor or heritage centre	36%	5	Shopping	47%
Base: Took part in activities/attractions in Ayrshire & Arran		122	Base: Took part in activities/attractions in Scotland		3,011

Satisfaction with attractions in Ayrshire & Arran

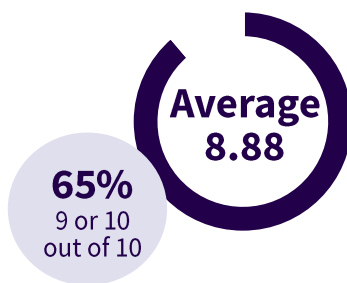
Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions



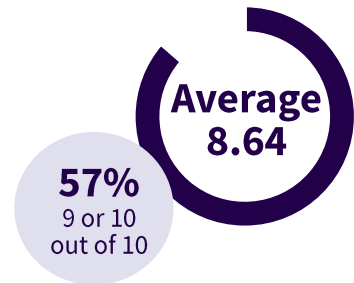
Scotland-wide sample 64%
(9 or 10 out of 10)

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 Ayrshire & Arran excl. n/a 110-112

Food and drink experiences in Ayrshire & Arran



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

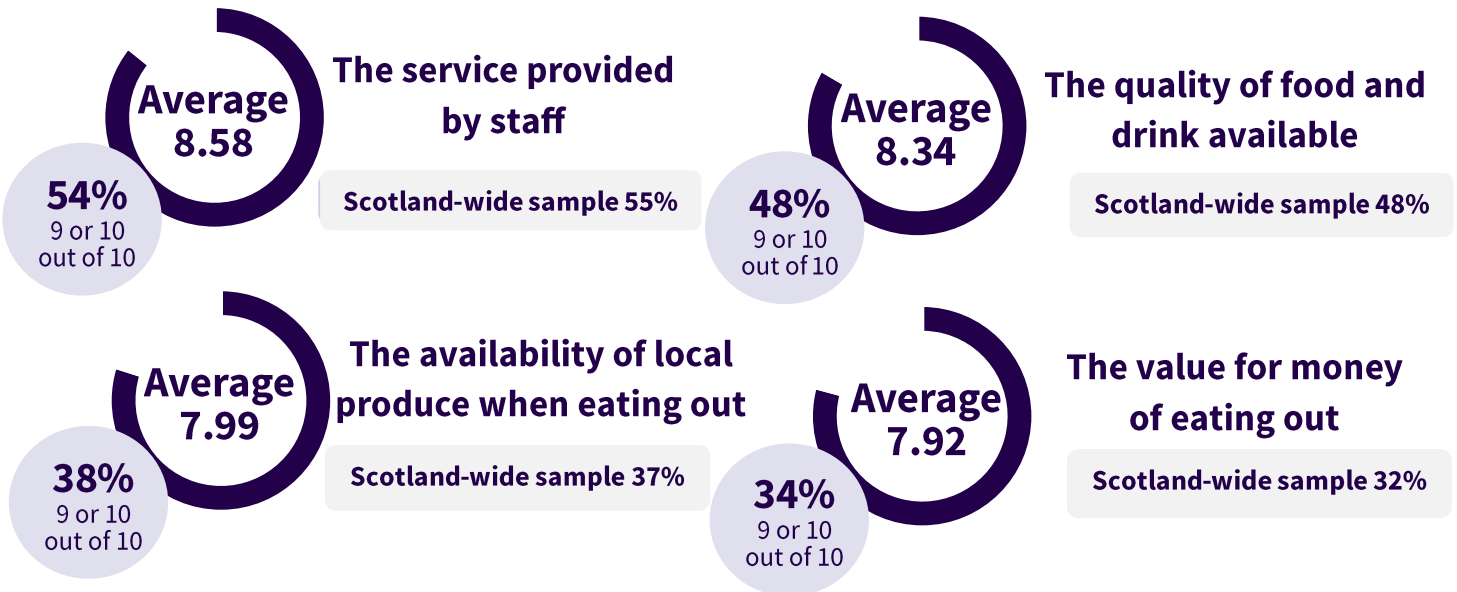
Key food and drink experiences included:

- 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)



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

Overall experience and likelihood to recommend Ayrshire & Arran



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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