



VISITOR SERVICES AUDIENCE SUMMARY – 2023 SEASON & BEYOND

1. Audience strategy. The cost-of-living crisis continues to impact the sector and 2023 will be a particularly challenging year for the visitor attraction. Maintaining our core demographic is business critical whilst we continue to develop other audiences where possible. Investment in visitor operations is currently very limited and the development of our aspirational audiences has slowed as a result. For example, plans for a new adventure playground to attract more families have been paused.

Collaboration with local organisations including VisitBute, Isle of Bute BID, AITC and Calmac is more important than ever as we seek to convert FIT visits to Bute, to visits to Mount Stuart. In April we will attend the VisitScotland Connect event to market Mount Stuart to national and international travel trade audiences with the goal to acquire new higher spend clients.

We continue to develop new audiences by providing authentic visiting experiences and new exhibitions. The 2023 exhibition, *Comics Uncovered! From Glasgow to Gotham*, appeals to a younger target audience and broadens our reach. For the first time in recent years, we are trialling 5 day opening in the shoulder season, open Saturday to Wednesday only. The aim of the trial is to condense our visitor business and reduce costs and we will monitor this strategy across the year.

2. Current demographic & market. We welcomed 27,153 paid visitors in 2022, down 13% on the last comparable year of 2019 (31,039). In 2022 Covid-19 impacted on European and International travel and travel restrictions continue to affect the Chinese travel market in 2023. Our current visitor demographic is described below.

Current Audience Segment	Characteristics
Locals	<ul style="list-style-type: none"> • Two key markets: young families and couples 55+ • Re-visit the gardens & café but do not visit the house unless they are bringing friends/family • A handful are Members, but most opt not to pay for admission • Follow our social accounts & actively engage
FITs (independent travellers)	<ul style="list-style-type: none"> • Couples, 55+, travel from the Central Belt, East Coast or north of England • Covid-19 has changed their buying habits and although they would traditionally purchase tickets on arrival, they now expect to be able to purchase in advance • Check our website but do not tend to actively engage with our social accounts
Travel Trade	<ul style="list-style-type: none"> • Approximately one-third of our paid visitors in 2019, 2021 & 2022 • Couples, 55+, travel from England, Ireland, the Netherlands, France & the USA • Approx. 85% of our travel trade clients base their business model on high volume/low cost • Coach visitors may check our website, but most prefer paper leaflets picked up in their hotel

3. Target demographic & market. Our target for paid visitors April-October 2023 is 24,630. Our target visitor demographic is described below.

Target Audience Segment	Characteristics
FIT - Families	<ul style="list-style-type: none"> • Local – converted to Members, visit regularly • Travelling nationally/internationally, • How? Targeted digital campaigns both on our own digital accounts and through collaboration with key partners including VisitScotland, The Coig, AITC & VisitBute. Development of our outdoor spaces to include trails/events which link to young people’s passions, interests and the school curriculum will be key.
FIT - Millennial Travellers	<ul style="list-style-type: none"> • Aged 20-40, travelling nationally/internationally • Sociable people who value experiences over possessions • Personality and authenticity of experiences is important, as is connectivity • Why target them? Loyal ambassadors who share their experiences online and generate free word of mouth publicity • How? Our social media accounts are evolving to engage this audience, providing innovative ‘of the moment’ content using language and popular culture which this group identifies with (sharing and engagement with content are the overall goals). Inspire the group with Influencers and use them to tell our story. In the wider context of Bute, the development of the Bute Yard including Isle of Bute Distillery will be vital in attracting this market to Bute.
Travel Trade – UK Inbound	<ul style="list-style-type: none"> • Travelling from USA, Germany & France • Why target them? They have a higher yield and spend per person than the average domestic visitor • How? Targeted sales through industry networking at Scotland Reconnect, ExploreGB etc., investment in foreign language interpretation is necessary to support this market
Travel Trade – Luxury Travel	<ul style="list-style-type: none"> • High Net Worth Individuals travelling internationally • Why target them? There are 18 million HNWI worldwide, their appetite for luxury travel translates into increased visitor spend • How? Targeted sales through industry networking at Scotland Reconnect, ExploreGB etc. Fam trips for key luxury buyers & the development of relationships with VS product planners

As we navigate our way ‘back to normal’ it is vital that our plan accommodates the need to be as accessible to as many markets as we possibly can. Our plan continues to evolve as people start to travel and discover new spaces and places.