International Ayr Show 2025: Event Impact Assessment

Report for South Ayrshire Council

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Gross Direct Spend: £17.9m

Net Direct Spend: £15.1m

Net Additional GVA: £7.2m

Event Summary

2-day event, held in September 2025

Total attendees: 260,000

The overall experience was rated highly - 99% rating the overall quality as very good or good.

59% of visitors reported that their experience at the event has made it more likely that they would return to South Ayrshire in the future.

1 Introduction

The International Ayr Show Festival of Flight is a two-day air show that takes place on the Ayr Shorefront. The main attraction is the air show itself which features a variety of different aircraft and displays.

The 2025 event took place on the Friday 5th and Saturday 6th September. In addition to the displays, the crowds enjoyed a diverse and extensive range of activities and thrill-seeking attractions in the festival village which included:

- Large scale funfair.
- Military and STEM zones.
- Family fun zone.
- Local traders market (over 20 local traders showcasing the talents and products of South Ayrshire businesses).
- Food zone (over 30 street food traders which included a variety of South Ayrshire traders).

The event is currently Scotland's only dedicated air show and attracted a total of 260,000 attendees over the two days of the event, with 55,000 attending on the Friday and 205,000 on the Saturday.

South Ayrshire Council commissioned EKOS to conduct an evaluation study to determine the economic impact and success of the 2025 event.

1.1 Study method

The Economic Impact Assessment (EIA) has been undertaken based on eventIMPACTS guidance and using a bespoke Excel-based impact model. The impact assessment has been informed by a survey of event attendees and local businesses (during the event) and was undertaken by South Ayrshire Council (SAC).

The report is set out as follows:

- **Chapter 2** presents findings from the visitor survey.
- **Chapter 3** presents findings from the business surveys.
- **Chapter 4** presents findings from the Economic Impact Assessment.
- **Appendix A** presents technical details of the Economic Impact Assessment.

2 Visitor Survey

This chapter presents feedback gathered from visitors at the event. A face-to-face survey was undertaken onsite with visitors to the event on the 5th and 6th September 2025. A total of 429 visitors were surveyed by IBP research.

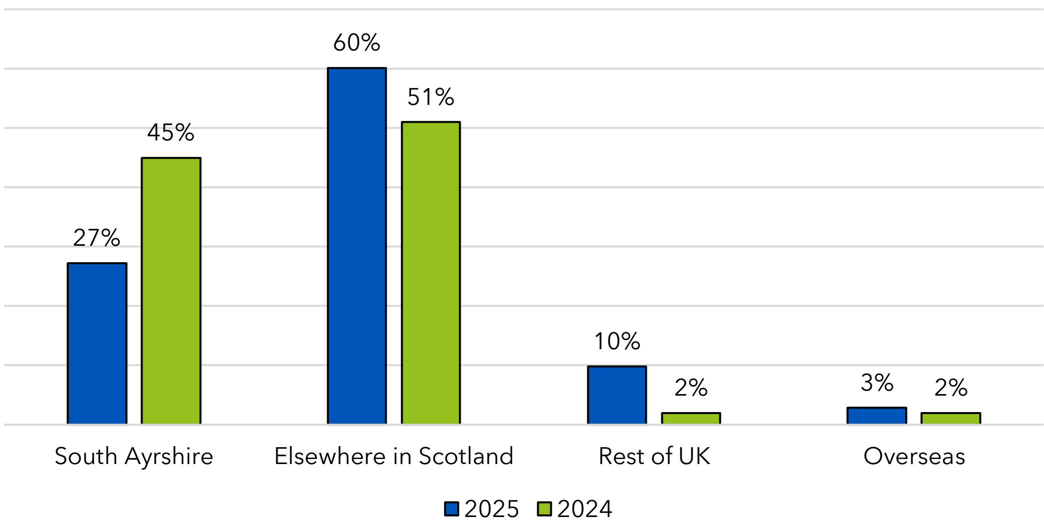
While trend and comparative analysis is useful in providing helpful insights, caution is advised given the different methodology adopted at each event (e.g. 2025 using IBP researchers and 2024 using teachers and Ryanair apprentices).

2.1 Visitor Feedback

Around one-quarter (27%) of respondents lived in South Ayrshire – this is significantly lower than 2024 event where 45% of respondents lived in South Ayrshire, **Figure 2.1**.

The majority of respondents were from elsewhere in Scotland (60%), particularly North Ayrshire (15%), East Ayrshire (7%) and Glasgow (7%).

Figure 2.1: Respondents by home location



N=419. 'Prefer not to say' have been removed. Rest of UK included: England (7% of total), Wales (2%), Northern Ireland (1%). Overseas included: Spain, France, Germany, Poland (all 0.5%), and USA, Norway and Italy (all 0.2%).

Respondents were asked to provide the postcode of residence which has been mapped in **Figure 2.2**.

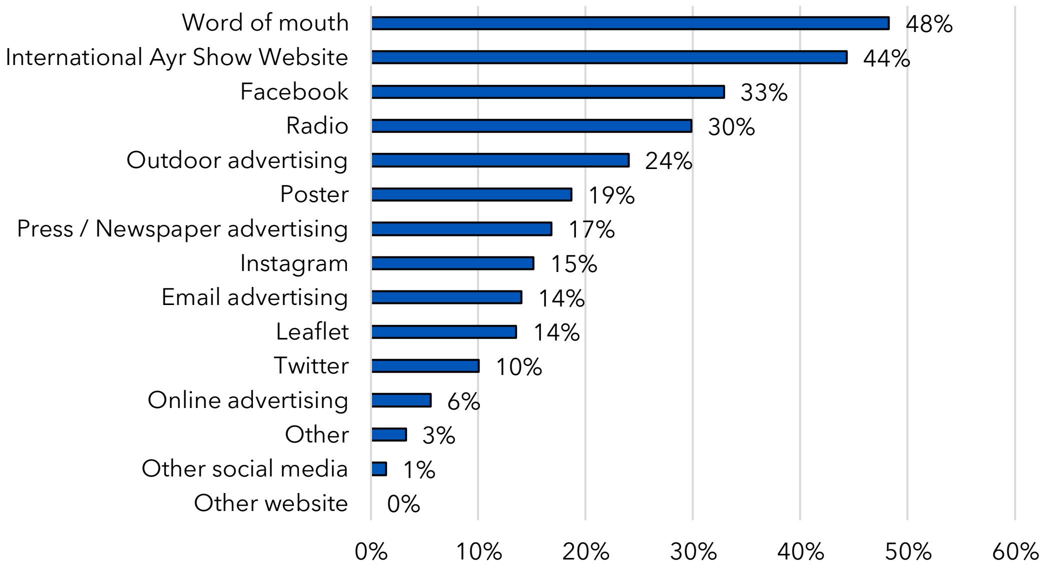
Figure 2.2: Respondents by postcode

N=365.

Finding out about the International Ayr Show 2025

Word of mouth (48%) was the most common way for visitors to become aware of the event (40% in 2024). The International Ayr Show website (44%) was also important as well as Facebook (33%), radio (33%) and outdoor advertising (30%), **Figure 2.3**.

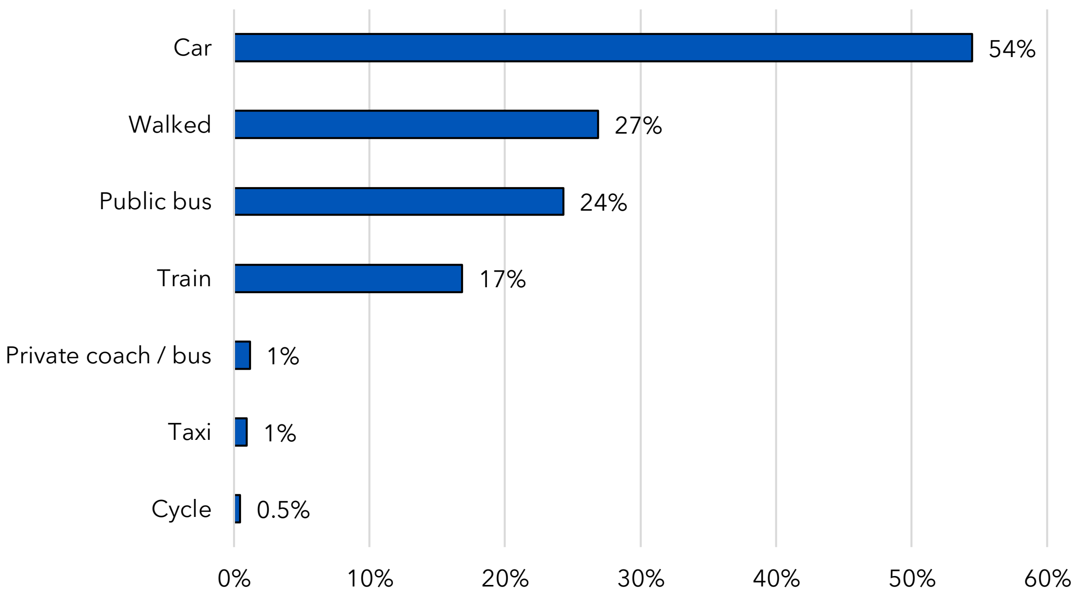
Figure 2.3: How did you hear about this event and/or the International Ayr Show generally this year?



N=429. Other included: previously attended (9), through aviation or hobby group (3), actively look out for it (1) and friends/family of performers (1). Other social media was TikTok (6).

Over half of respondents (54%) travelled by car to the event – this was followed by around one-quarter of respondents walking (27%) or taking public bus (24%), **Figure 2.4**.

Figure 2.4: Which methods of travel did you use to get to Ayr for this event?

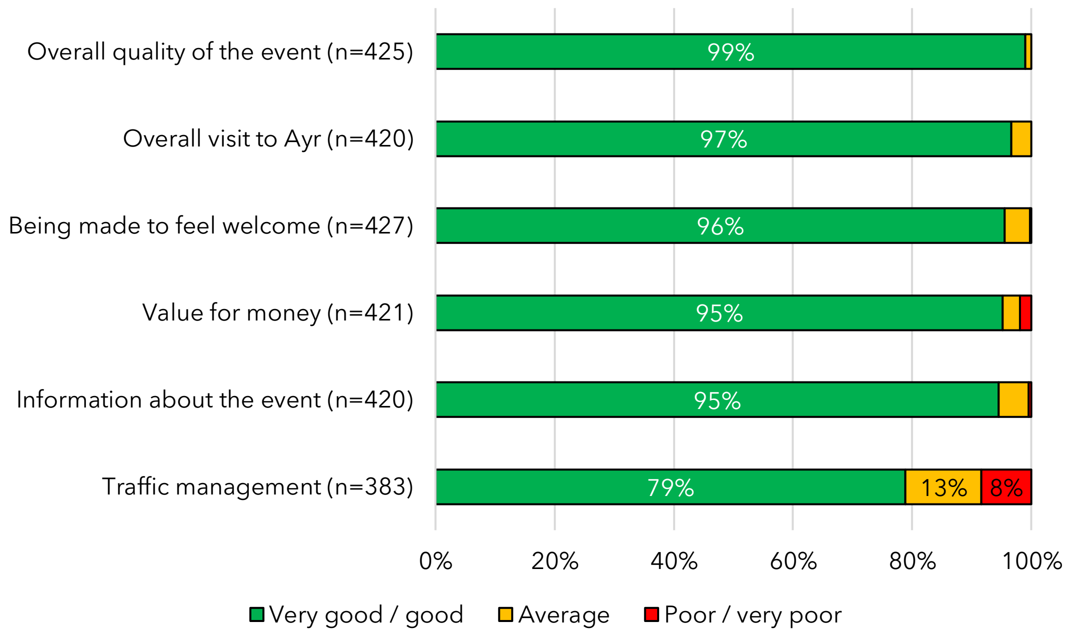


N=428.

Views on the International Ayr Show 2025

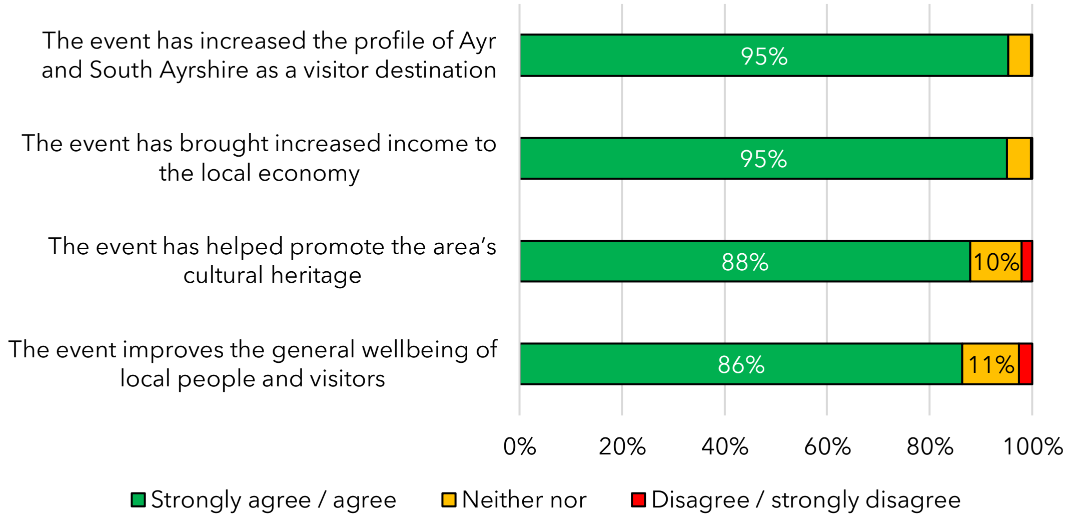
Attendees were extremely positive about the event, with 99% of respondents rating the overall quality of event as 'very good' (84%) or 'good' (15%), **Figure 2.5**. Traffic management received a comparatively lower rating, however 79% still rated it as very good or good.

Figure 2.5: How would you rate the quality of your experience at this event?



Almost all attendee respondents (95%) strongly agreed or agreed that the International Ayr Show has increased the profile of Ayr and South Ayrshire as a visitor destination, **Figure 2.6**. A similar proportion agreed that the event has brought increased income to the local economy.

Figure 2.6: To what extent would you agree or disagree with the following statements?



Base numbers ranged from 425 to 429.

Comparison to previous event

Around three in five respondents (57%) had previously attended the International Ayr Show or another air show in Ayr in previous years.

Of these respondents, one-third (33%) reported that the 2025 event was better or much better than previous year(s) – most (66%) stated that it was similar to previous events, **Table 2.1**.

Table 2.1: How does this year's International Ayr Show compare with previous year(s)?

	% of respondents
Much better	10%
Better	23%
Similar	66%
Worse	1%

N=240. Question only asked to respondents who indicated previous attendance.

The International Ayr Show made a positive difference to 59% of attendees (who lived outwith South Ayrshire) on their likelihood of visiting Ayr / South Ayrshire again in the future with almost half (42%) much more likely to visit again, **Table 2.2**.

Table 2.2: What difference, if any, has your experience of attending the International Ayr Show Festival of Flight made to your likelihood of visiting Ayr / South Ayrshire again in the future?

	% of respondents
Much more likely	42%
A bit more likely	18%
No difference	36%
A bit less likely	3%
Much less likely	2%

N=296. Question only asked to respondents who lived outside of South Ayrshire.

Respondent profile

The main findings from the respondent profile breakdown include that:

- Female respondents comprised 52% of total respondents compared to 48% males and 0.5% respondents of other gender, **Table 2.3**.
- Almost half of respondents (46%) were aged between 35 and 64, **Table 2.4**.
- Respondents were asked how many people they attended the event with. Party sizes ranged from 1 to 13, and the total respondent population (including their party) was 1,474 – the average party size was 3.6 people.
- There was a slightly higher proportion of females in younger age groups compared to males (e.g. 12% of females were aged 16 to 24 compared to 9% of males) and a slightly higher proportion of males in older age groups compared to females (e.g. 13% of males aged 65 and over compared to 10% of females), **Figure 2.7**.
- Around 12% of respondents self-reported an illness, disability or infirmity with the most common affecting their mobility (7%), hearing (2%) and vision (1%), **Table 2.5**.
- Of respondents who indicated a health condition, only 8% (or four respondents) stated the event could be improved for someone that has such an illness, disability or infirmity. Suggested areas for improvement include: dedicated quiet area or space (two respondents), and improved

accessibility (two respondents) such as more ramps and better pathways from car park.

Table 2.3: Respondents by gender

	% of respondents
Female	52%
Male	48%
Other	0.5%

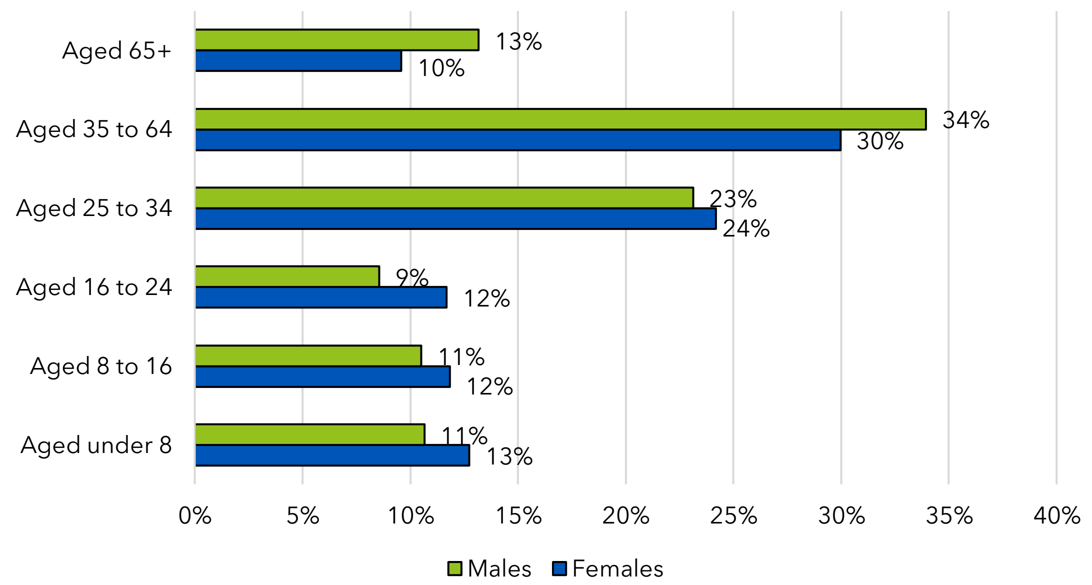
N=429.

Table 2.4 Respondents by age

	% of respondents
Aged 16 to 24	8%
Aged 25 to 34	31%
Aged 35 to 64	46%
Aged 65 and above	14%

N=428. Prefer not to say excluded.

Figure 2.7: Respondents party by gender and age



N=1474.

Table 2.5: Respondents by illness, disability or infirmity

	% of respondents
Mobility	59%
Hearing	20%
Vision	10%
Other	14%

N=51. Other included: autism (4), Arfid (1), anxiety (1) and sensory issues (1). Question asked respondents who answered previous question that they had an illness, disability or infirmity.

3 Business Survey

This chapter presents summary findings of the business surveys. Business feedback was gathered in two ways: in-person interviews and an online survey.

In total, **50 in-person interviews** were conducted by SAC with retail and hospitality businesses (42 interviews) and accommodation providers (8 interviews). These interviews were targeted at a range of retail, hospitality and accommodation providers in Ayr town centre who were likely to benefit from the airshow as a tourism-related business. A SAC officer visited these businesses to assist with the completion of the questionnaire.

An online survey was also promoted and distributed by SAC which attracted **56 responses**. The online survey was self-selecting and open to all businesses to complete.

In total, the primary research engaged with a total of **106 businesses**.

Business feedback

Key summary findings are presented below (where possible, quantified feedback has been combined across the different strands of primary research).

Impact on customer footfall and business

- Over half of interviewed businesses (54%) reported an increase in customers or bookings over the airshow weekend – only a few respondents were able to quantify this increase, and this ranged from 10% to 50% (the online survey contained outliers of 500% and 700% increases).
- Almost one-third of interviewed businesses reported a decrease in customers (31%) and a majority of online survey respondents (86%) reported no noticeable increase in customers.
- All interviewed accommodation providers (eight respondents, 100%) were fully booked over the airshow weekend with 75% (or six respondents) able to charge a premium rate. These respondents noted that revenue during

the airshow weekend had increased between 10% and 32% compared to regular weekend bookings.

Perceived economic impact on Ayr and South Ayrshire

- Around three in five businesses (61%) state that the airshow had a positive economic impact on Ayr and South Ayrshire – this rises to 98% for interviewed businesses (compared to 30% of online survey respondents).

Future airshow events in Ayr

- Around three in five businesses (61%) are supportive of future airshows being held in Ayr – this rises to 98% for interviewed businesses (compared to 29% of online survey respondents).

Other observations

Interviewees and online survey respondents were asked whether they had an any other observations related to the airshow. Positive comments from respondents included:

- Excitement and enthusiasm amongst respondents describing the airshow as "fun" and "fantastic" for the town to host.
- The event brings more visitors and business to Ayr, with some businesses noted that they had adapted their products and services to be airshow-themed and capitalise on the opportunity of the event.
- Improved operation compared to previous years.

Negative comments and/or suggested areas for improvement included:

- Traffic and parking, such as lack of parking permits for staff and/or deliveries.
- Internet and WiFi connectivity was challenging.
- Greater provision of toilets is required.
- Anti-social behaviour.

4 Economic Impact Assessment

This chapter presents a summary assessment of the economic impacts generated through the International Ayr Show, Festival of Flight 2025 on the South Ayrshire economy. Full technical details of the impact assessment can be found in **Appendix A**.

Key messages are as follows.

- **Total Event Attendees: 260,000**
- **Gross Direct Spend: £17.9m**
- **Net Direct Spend: £15.1m**
- **Net GVA: £7.2m**

4.1 Approach

The Economic Impact Assessment (EIA) is based on the feedback provided by the 429 interviews onsite at the International Ayr Show 2025.

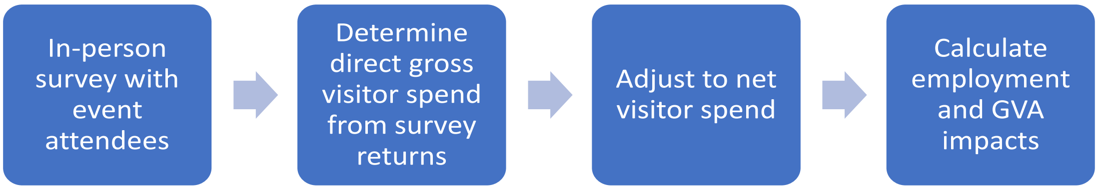
The fieldwork design and collection were undertaken by EKOS and IBP research using accredited researchers.

The survey sought details on the visitors' home residence, party size (by age and gender), mode of transport to event, awareness of event, actual spend during attendance at the event and any accommodation, as well as their views on quality of experience and likelihood to visit South Ayrshire or Scotland in the future. Spend data was broken down by food, drink, accommodation, entertainment, shopping and transport.

This data was then used to conduct an economic impact assessment in line with the eventIMPACTS methodology using a bespoke Excel model.

A simplified flowchart of the economic impact process is provided in **Figure 4.1**.

Figure 4.1: Economic Impact Process



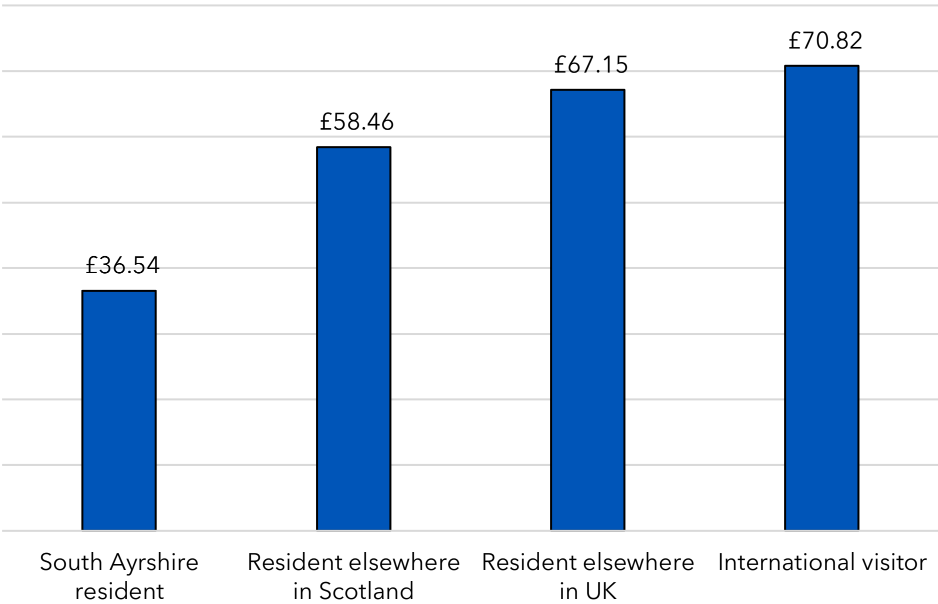
4.2 Gross Impacts

Gross impacts are determined by the responses to the survey questions around spending at the event and elsewhere in South Ayrshire.

Total daily spend by survey respondents was £26,192. Total daily spend after removing outliers was £21,138.

Visitors from the rest of the UK and overseas had notably larger average spend, driven by additional drink and shopping costs, **Figure 4.2**.

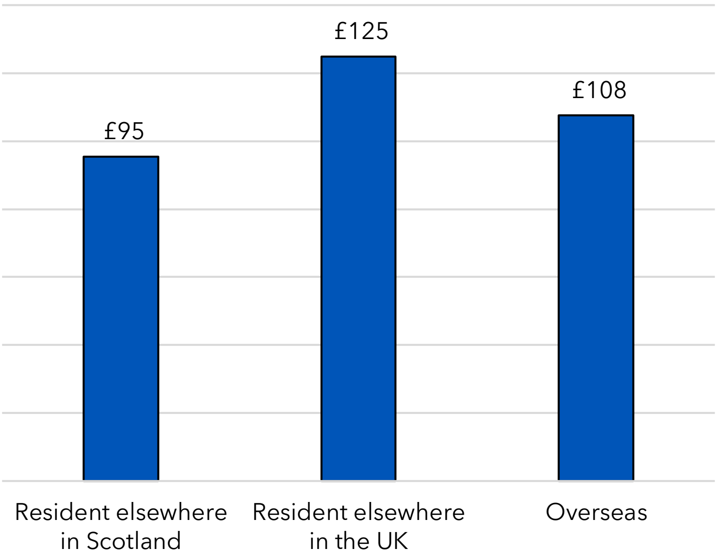
Figure 4.2: Average Daily Spend per attendee by Place of Residence (outliers removed)



N=395.

The average accommodation spend by survey respondents was £115. **Figure 4.3** shows the breakdown by place of residence.

Figure 4.3: Average Accommodation Spend per attendee by Place of Residence



N=64.

Total Visitor Numbers

Visitor numbers were estimated at 260,000 by the event organisers, with 205,000 attending on the Saturday and 55,000 attending on the Friday. We have assumed that visitors were asked about spend on the day of their visit and have therefore not made allowances for unique visitors.

4.2.1 Grossed Up Impacts

The expenditure impacts are grossed up to the total population based on the inverse of the proportion responding to the survey (e.g. a response rate of 5% generates a grossing up factor of 100%/5% = 20).

Therefore, with a total respondent population of 405 (total respondent population after removing statistical outliers) and a total number of attendees of 260,000, the impacts are grossed up by 642. Responses from different geographic areas are separately grossed up and summed.

Statistical outliers (values that lie outside the range defined as plus or minus twice the standard deviation for that variable) were removed from the sample and added back in after grossing up.

Total gross spend/expenditure at the International Ayr Show 2025 is therefore estimated at **£17.9m** at the South Ayrshire level.

4.3 Net Impacts

The net impact is what is generated by the International Ayr Show 2025 event, adjusted for displacement, leakage, deadweight and multiplier effects.

4.3.1 Deadweight

Deadweight is a measure of the extent to which impacts would have happened anyway in the absence of the public sector (SAC) funding support for hosting the event. Deadweight was judged to be zero as the event would not have proceeded in the absence of the public sector support.

4.3.2 Leakage

Leakage assesses the level of expenditure that takes place outside the 'target' geographic area at which the economic impact is being assessed. This has been judged to be zero, as impact questions were specifically about spend/expenditure that took place within South Ayrshire.

4.3.3 Displacement

Displacement is a measure of the extent to which the event has moved expenditure from one part of the economy to another through increased competition.

Displacement is judged based upon several factors, which are:

- Their place of residence.

- The importance of the event in their decision to visit (and spend money) within South Ayrshire.

The place of residence is important, as for those residing within the geographical area of study, displacement is 100% in line with the eventIMPACTS methodology. This means that the spend of a resident of South Ayrshire would not be included at the South Ayrshire level or at higher level geographies. This is due to the assumption that their spend at the event would have taken place within that geographic area if they had not attended.

Their importance of their visit to South Ayrshire is important to determine how attributable attendee spend is to the event. If they had visited solely to attend the event then their spend would be fully attributable, if they had visited for other reasons, then spend would be partly attributable.

Based on these responses, the levels of displacement are set out in **Table 4.1**.

Table 4.1: Displacement (%)

	Displacement at South Ayrshire Level
South Ayrshire Resident	100%
Resident Elsewhere in Scotland	8%
Resident Elsewhere in UK	31%
Resident Overseas	62%

4.3.4 Multipliers

Multipliers relate to the impact of additional economic impact that occurs because of spending through additional income, supplier purchases, and longer-term effects.

Multipliers are sourced from the Scottish Input/ Output tables for the relevant sectors. Data is only available at the Scotland level; we have therefore adopted a conservative approach to estimating the potential multiplier effects of 33% at the South Ayrshire level.

4.3.5 Net Spend

Applying these additionality factors generates an estimated net overall spend/expenditure of £15.1m at the South Ayrshire level.

4.4 Net GVA

Organiser spend will contribute to the economic impact of the festival. In this case net organisational spend for the overall International Ayr Show 2025 event was close to break-even so overall net additional expenditure is unchanged.

We then convert the net spend figure above to GVA. GVA is a measure of economic activity and accounts for the overall value added to the economy by the event. On a basic level this is the sum of profits and wages generated.

Using the spending to GVA ratio of 48% outlined in the eventIMPACTS methodology, this equates to net additional GVA as outlined in **Table 4.2**.

Table 4.2: Net Additional Impacts

	Net Spend	Net GVA
South Ayrshire	£15.1m	£7.2m

4.5 Comparison to 2024 event

It should be noted that the economic impacts in the 2025 event is a significant increase compared to the 2024 event, **Table 4.3**. This is likely due to methodology challenges faced during the 2024 event, specifically related to questionnaire design and data gathering process, namely:

- Challenges with questionnaire design such as lack of spend and additionality questions.
- Interviews being conducted by non-professional interviewers.

Table 4.3: Net Additional Impacts at South Ayrshire level

Event Year	Net Spend	Net GVA
2025	£15.1m	£7.2m
2024	£6.1m	£2.9m

These methodology challenges necessitated a conservative approach to estimating the economic impacts of the 2024 event. The EIA for the 2025 event resolved these issues to be robust and in line with eventsIMPACT methodology.

Beyond these methodology challenges, the primary drivers for the larger impacts are a larger proportion of attendees that are resident outwith South Ayrshire and a larger daily spend per person than estimated for the previous event.

Appendix A: EIA Technical Details

This appendix set out the technical details of the EIA that has been conducted for the International Ayr Show 2025. Our approach is in keeping with the principles for economic impact assessment as set out in the eventIMPACTS methodology.

Geographic Area of Study

Impacts are calculated at the South Ayrshire level.

Routes to Impact

It is important to note the mechanisms through which each event generates impacts, known as the Routes to Impact. In this case, the Routes to Impact are largely derived from expenditure by visitors with data gathered from the visitor surveys, both at the event, and off-site expenditure in shops, restaurants, hotels, etc.

To gather visitor expenditure data, a face-to-face survey was undertaken onsite over the course of the event. The fieldwork design and collection were undertaken by EKOS and IBP research using accredited researchers.

Respondents were asked a number of questions to determine economic impact. These were:

- their place of residence.
- their individual spend during their trip to the event (total and by type e.g. food, drink, accommodation, entertainment, shopping and transport).
- the importance of the event to their visit to South Ayrshire and Scotland.
- what they would have done in the absence of the event.

Visitor Spend

Table A.1 outlines the detailed spend of survey respondents by place of residence and type of spend.

Table A.1: International Ayr Show 2025 Detailed Spend by Place of Residence

Spend type	South Ayrshire	Elsewhere in Scotland	Elsewhere in the UK	Overseas	Total
Food	£1,679	£7,726	£1,415	£390	£11,237
Drink	£1,323	£5,175	£1,171	£310	£8,016
Entertainment	£496	£1,681	£390	£90	£2,677
Shopping	£350	£1,362	£640	£145	£2,527
Transport	£318	£1,126	£227	£64	£1,735
Total	**£4,166**	**£17,070**	**£3,843**	**£999**	**£26,192**

N=429. Spend data from the ten respondents who preferred not to state their place of residence has been included in the total row. Transport spend excludes the costs of getting to and from the event from outside South Ayrshire.

Total Visitor Numbers

Visitor numbers were estimated at 260,000 by the event organisers, with 205,000 attending on the Saturday and 55,000 attending on the Friday. We have assumed that visitors were asked about spend on the day of their visit and have therefore not made allowances for unique visitors.

Grossed Up Impacts

The expenditure impacts are grossed up to the total population based on the inverse of the proportion responding to the survey (e.g. a response rate of 5% generates a grossing up factor of 100%/5% = 20).

Therefore, with a total respondent population of 405 (total respondent population after removing statistical outliers) and a total number of attendees of 260,000, the impacts are grossed up by 642. Responses from different geographic areas are separately grossed up and summed.

Total gross spend/expenditure at the International Ayr Show, Festival of Flight 2025 is therefore estimated at **£17.9m** at the South Ayrshire level.

Net Impacts

The net impact is what is generated by the International Ayr Show 2025 event, adjusted for displacement, leakage, deadweight and multiplier effects.

Deadweight

Deadweight is a measure of the extent to which impacts would have happened anyway in the absence of this event. This was judged to be zero as nothing would have happened in the absence of this event.

Leakage

Leakage is expenditure that takes place outside the geographic area at which the economic impact is being assessed. This has been judged to be zero, as impact questions were specifically about spend that took place within South Ayrshire.

Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another.

Displacement is judged based upon a two factors, which are:

- their place of residence.
- the importance of the event to the visit to South Ayrshire.

The place of residence is important, as for those residing within the geographical area of study, displacement is 100% in line with the eventIMPACTS methodology. So, for example, the spend of a resident of South Ayrshire would not be included at the South Ayrshire level or at higher level geographies. This is due to the assumption that their spend at the event would have taken place within that geographic area if they had not attended.

Their importance of their visit to South Ayrshire is important to determine how attributable attendee spend is to the event. If they had visited solely in order to attend the event then their spend would be fully attributable, if they had visited for other reasons, then spend would not be attributable or only partly attributable.

Note: Question was only asked to those who reside outside of South Ayrshire and/or Scotland.

Based on these responses, the levels of displacement are set out in **Table A.2**.

Table A.2: Displacement (%)

	Displacement at South Ayrshire Level
South Ayrshire Resident	100%
Resident elsewhere in Scotland	8%
Resident elsewhere in UK	31%
Resident Overseas	62%

Multipliers

Multipliers relate to the impact of additional economic impact that occurs as a result of spending through additional income, supplier purchases, and longer-term effects. Multipliers are applied to GVA and employment factors.

There are two main mechanisms through which multiplier effects are realised:

- income effect – the money received through the event is paid out in wages to workers which is subsequently spent in the local economy driving additional economic impact.
- supplier effect – money is spent in the local economy on suppliers for the event, driving additional economic impact.

Multipliers are taken from the Scottish Input/ Output tables for the relevant sectors and is outlined in **Table A.3**. Data is only available at the Scotland level; we have therefore adopted a conservative approach to estimating the potential multiplier effects 33% at the South Ayrshire level.

Table A.3: Multipliers

	Event Spend Multiplier
Sector	Average of Retail, Food & Beverage Services, Sport & Recreation
Scotland Multiplier	1.66
South Ayrshire Multiplier	1.22

Net Spend

Applying these additionality factors generates an estimated net overall spend/expenditure of £15.1m at the South Ayrshire level.

Net Organisational Spend

As well as the impacts generated through visitor spend, we must also consider the economic impacts generated through spending in the local economy on organising the event.

In line with eventIMPACTS methodology, this is considered as Net Organisational Spend which is calculated at total organisational spend minus total organisational income.

Net organisational spend is then added to net direct visitor spend to generate total net direct spend. Net organisational spend is then added to net direct spend to determine the overall economic impact.

In this case, the organisation of the International Ayr Show 2025 had a break-even level of spend and net organisational spend was therefore zero, and contributing no additional economic impacts.

GVA

We then convert the net spend figure above to GVA. GVA is a measure of economic activity and accounts for the overall value added to the economy by the event. On a basic level this is the sum of profits and wages generated.

Using the spending to GVA ratio of 48% outlined in the eventIMPACTS methodology, this equates to net additional GVA and net additional FTE jobs as outlined in **Table A.4**.

Table A.4: Net Additional Impacts

	Net Spend	Net GVA
South Ayrshire	£15.1m	£7.2m