



Insight Department:  
Argyll and the Isles Factsheet | 2019

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# Introduction

## Background Information and Aim

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This report provides a summary of statistics on tourism in Scotland's Argyll and the Isles region (Argyll and Bute council area). 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](http://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](http://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.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Most international and domestic figures refer to the Argyll and Bute local authority. However, some international figures are only available at a wider regional level. For this reason, the "Duration of stay" and "Seasonality" charts on page 6 are based on data for the "Loch Lomond, Stirling, Trossachs and Argyll" region including the following local authorities: Argyll and Bute, Clackmannanshire, Falkirk and Stirling. Accommodation occupancy rates on page 5 also refer to this wider region.

This report starts with an **overall** evaluation of Argyll and the Isles 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 in the region 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 Argyll & the Isles

## Latest Figures



Inveraray Castle  
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### Overall Tourism Summary: Visits, Nights and Spend in Argyll & the Isles, 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	81	-7%	307	+14%	35	+35%
North America	39	0%	129	-16%	18	+1%
Rest of World	27	+28%	112	+50%	9	+35%
<b>Total International Overnight</b>	<b>147</b>	<b>0%</b>	<b>548</b>	<b>+10%</b>	<b>62</b>	<b>+22%</b>
Scotland	491	+24%	1,626	+24%	88	+29%
Rest of Great Britain	355	+10%	1,784	+18%	111	+12%
<b>Total Domestic Overnight</b>	<b>846</b>	<b>+18%</b>	<b>3,411</b>	<b>+21%</b>	<b>199</b>	<b>+19%</b>
<b>Total Overnight Tourism</b>	<b>993</b>	<b>+15%</b>	<b>3,959</b>	<b>+19%</b>	<b>261</b>	<b>+20%</b>
<b>Total Day Tourism</b>	<b>5,538</b>	<b>+14%</b>	<b>N/A</b>	<b>N/A</b>	<b>182</b>	<b>+90%</b>
<b>Grand Total</b>	<b>6,531</b>	<b>+14%</b>	<b>3,959</b>	<b>+19%</b>	<b>443</b>	<b>+41%</b>

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](https://visitscotland.org).

# Visitors to Argyll & the Isles

## Tourism Performance | 2019

In 2019, Argyll and the Isles witnessed **notable growth in overnight tourism**. Both **domestic and international visitors increased** in numbers which resulted in even bigger rises in nights and expenditure.

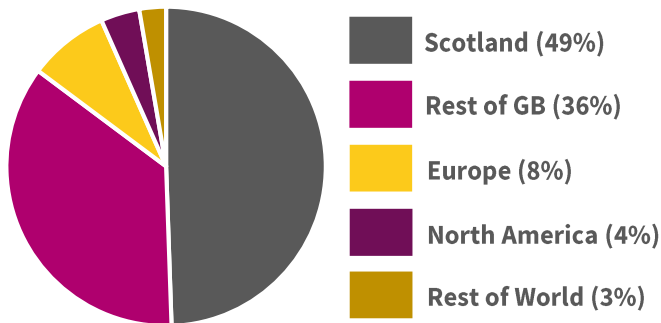
Between 2017 and 2019, **overnight trips** to Argyll and the Isles were just under **a million per year** on average, a 15% increase from 2016-2018. Similarly to other Scottish regions, this rise was driven by domestic travellers, particularly residents of Scotland. At four million and £261 million per year, respectively, **bednights** and overnight tourism **expenditure grew by a fifth** from their 2016-2018 levels.

There were no big changes in Argyll and the Isles' visitor mix in 2017-2019. **Scottish residents** accounted for roughly **half of all overnight trips** and **a third of the total overnight spend**. English and Welsh travellers also continued to be vital for tourism in the region. While they did not make as many trips to Argyll and the Isles as Scottish travellers, they spent **more time and money** in the region.

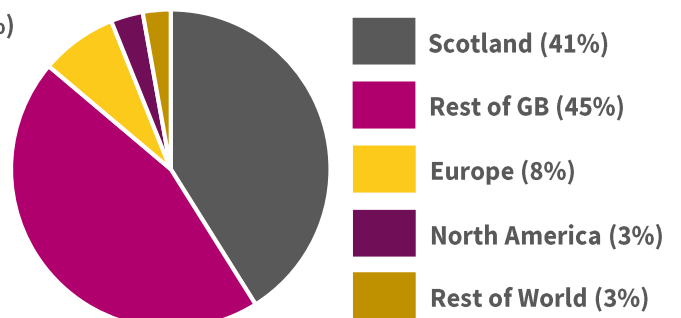
**Europeans** form the majority of international travellers to Argyll and the Isles. Despite declining by 7% in 2017-2019, they accounted for more than half of all overseas bednights and spend in the region. Number of trips by North American residents remained unchanged from 2016-2018.

Figures indicate a very significant **increase in domestic day tourism spend** in Argyll and the Isles which reached £182 million per year on average in 2017-2019.

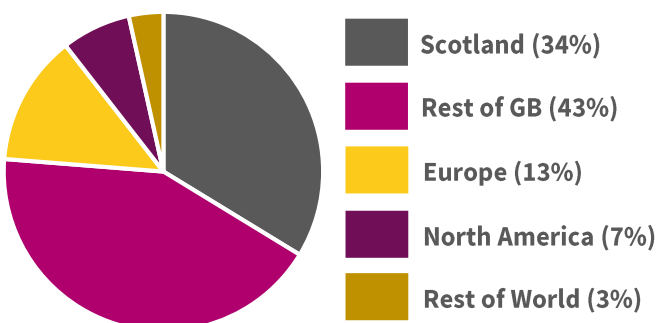
### Overnight Visits



### Nights



### Overnight Spend



Sources: GBTS/IPS, 2017-19.



# Regional Tourism Performance

## Local Statistics

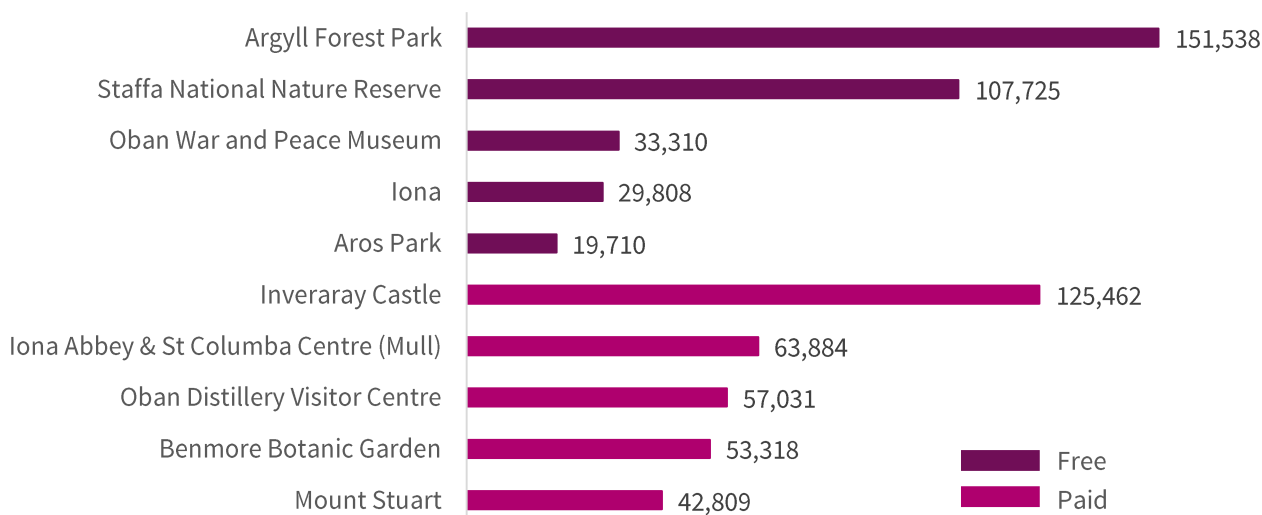
### Regional Sustainable Tourism\* – Business Units, Employment and Gross Value Added, 2018

Local Authority	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Argyll and Bute	611	+2%	5.7	+4%	114.8	+9%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit [visitscotland.org](http://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 24<sup>th</sup> June 2020 and cover the period up to 2018.

### Top Five Free and Paid Visitor Attractions in Argyll & the Isles (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](mailto:info@moffatcentre.com).

### Occupancy Rates by Accommodation Type and Month, Argyll & the Isles and Forth Valley 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	62%	64%	67%	76%	83%	87%	83%	87%	82%	77%	62%	61%	74%
Guest House/B&B (Room Occ.)	37%	48%	34%	45%	72%	70%	74%	86%	69%	46%	38%	17%	52%
Self-Catering (Unit Occ.)	43%	50%	54%	55%	63%	63%	67%	71%	59%	53%	35%	40%	54%
Hostel (Bed Occ.)	16%	31%	32%	56%	66%	60%	67%	72%	60%	43%	26%	27%	50%

Source: SAOS, 2019.

## II. International Visitors to Argyll & the Isles

### Overnight Tourism

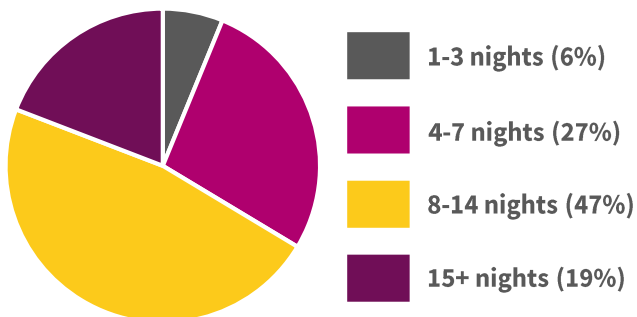
Visitor statistics indicate a **great rise in international tourism** to Argyll and the Isles in 2019, particularly in terms of **bednights** and **expenditure**. At 150,000, number of overseas trips grew by a fifth from 2018. Figures suggest international travellers spent nearly 700,000 nights and £90 million in Argyll and the Isles in 2019 driven by a big **increase in holiday travel, stay and spend** in the region. As a result of this growth, Argyll and the Isles accounted for 4.3% of all international trips and 3.5% of the total overseas spend in Scotland in 2019. Between 2017 and 2019, more than half of all overseas trips to the region were made by residents of the USA, Germany, Netherlands and Australia.

#### National and Regional International Tourism Performance, 2019

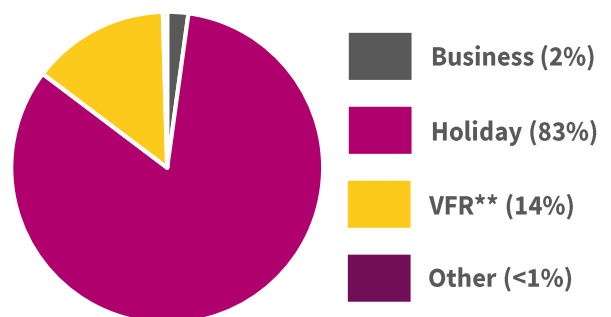
Indicators	Scotland		Argyll & the Isles	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	3,460	-7%	150	+19%
Spend (£M)	2,538	+7%	90	+128%
Nights (000s)	27,385	+8%	691	+60%
Average length of stay	7.9 nights	+16%	4.6 nights	+34%
Average spend per day	£93	0%	£131	+43%
Average spend per visit	£734	+15%	£602	+91%

Source: IPS, 2019.

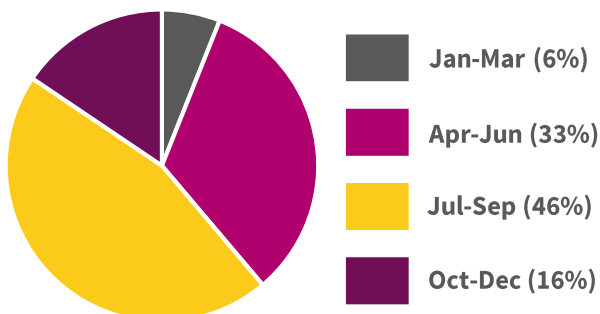
#### Duration of Stay\*



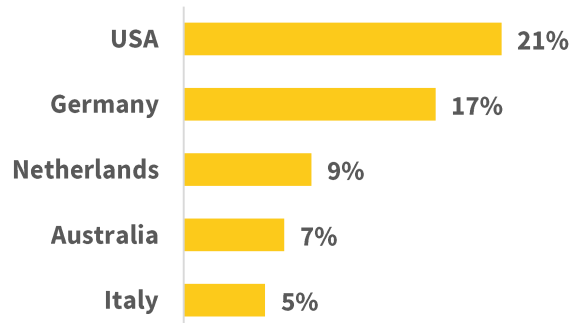
#### Purpose of Travel



#### Seasonality\*



#### Top 5 Overseas Markets



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

\*Duration of stay and seasonality data refers to the wider Loch Lomond, Stirling, Trossachs and Argyll region (including Argyll and Bute, Clackmannanshire, Falkirk and Stirling). \*\*VFR = Visiting friends or relatives.

# III. Domestic Visitors to Argyll & the Isles

## Overnight Tourism

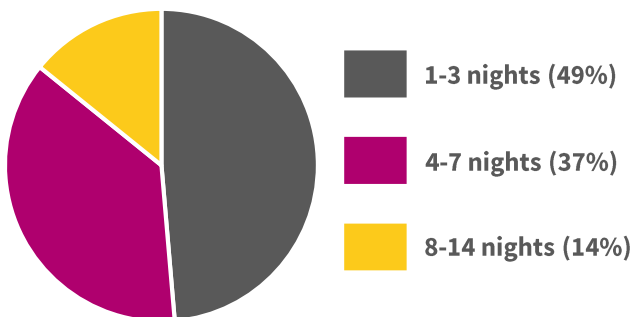
The **strong performance** of tourism in Argyll and the Isles in 2019 was also observed among **domestic** visitors. British residents undertook more than a million overnight trips to the region which marked a 41% increase from 2018. Bednights rose by nearly a half to 4.2 million, while tourism expenditure grew by two-thirds to reach £240 million. These figures represent **7.3% of the domestic overnight visits** and **7.5% of the associated spend** nationally in 2019. Domestic overnight travel increased across all travel purposes and all seasons, except for the first quarter of the year. Between 2017 and 2019, seven in ten British trips to Argyll and the Isles occurred between April and September.

### Domestic Overnight Tourism, 2019

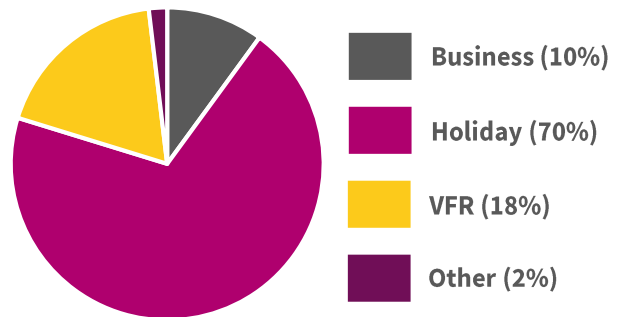
Indicators	Scotland		Argyll & the Isles	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	13,810	+17%	1,015	+41%
Spend (£M)	3,200	+16%	240	+69%
Nights (000s)	46,413	+15%	4,241	+47%
Average length of stay	3.4 nights	-2%	4.2 nights	+5%
Average spend per day	£69	+1%	£57	+15%
Average spend per visit	£232	-1%	£236	+20%

Source: GBTS, 2019.

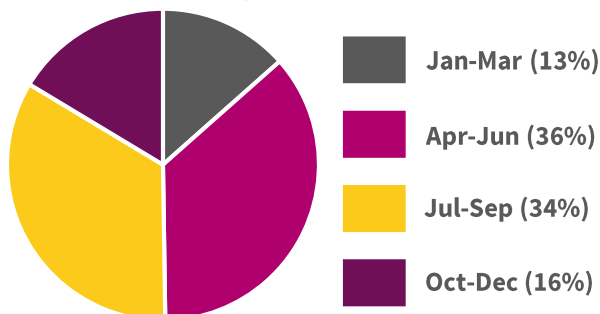
#### Duration of Stay



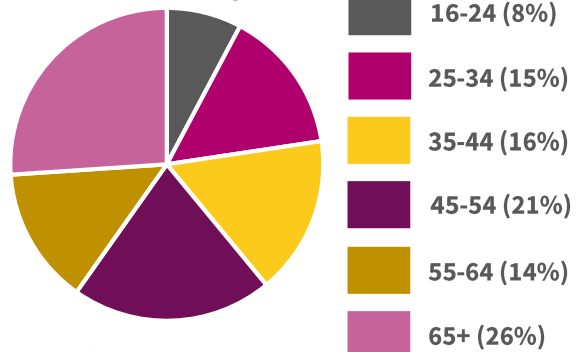
#### Purpose of Travel



#### Seasonality



#### Visitors' Age



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

# Domestic Day Visits to Argyll & the Isles

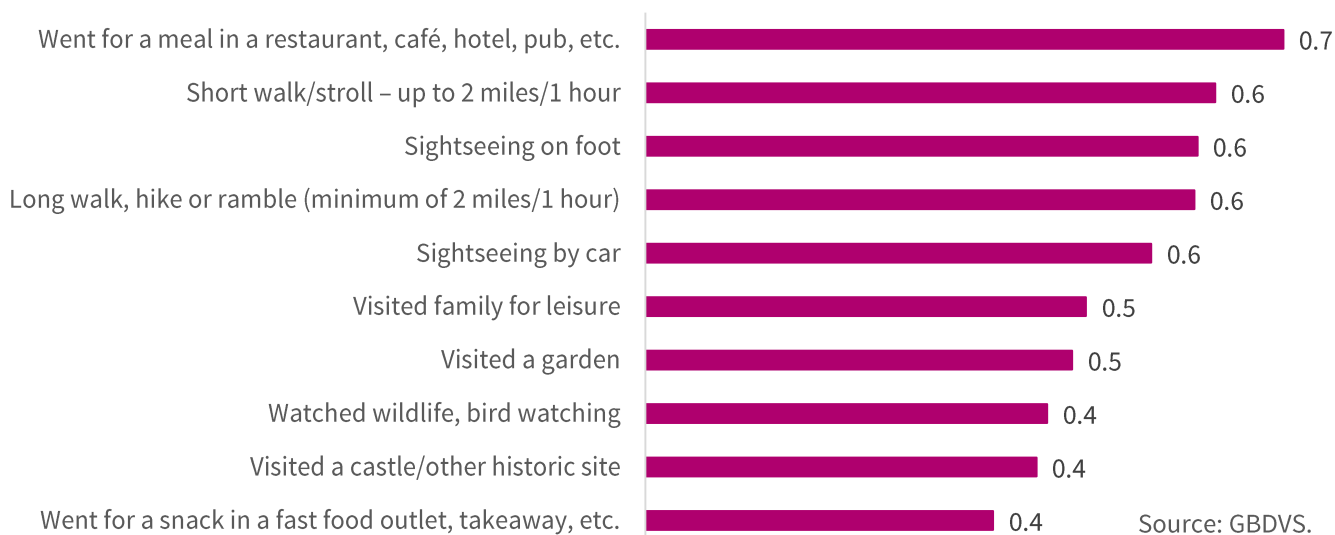
## Tourism Performance and Activities

### 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%
Argyll & the Isles	5.5	+14%	182	+90%

Source: GBDVS.

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



The Sound Of Mull  
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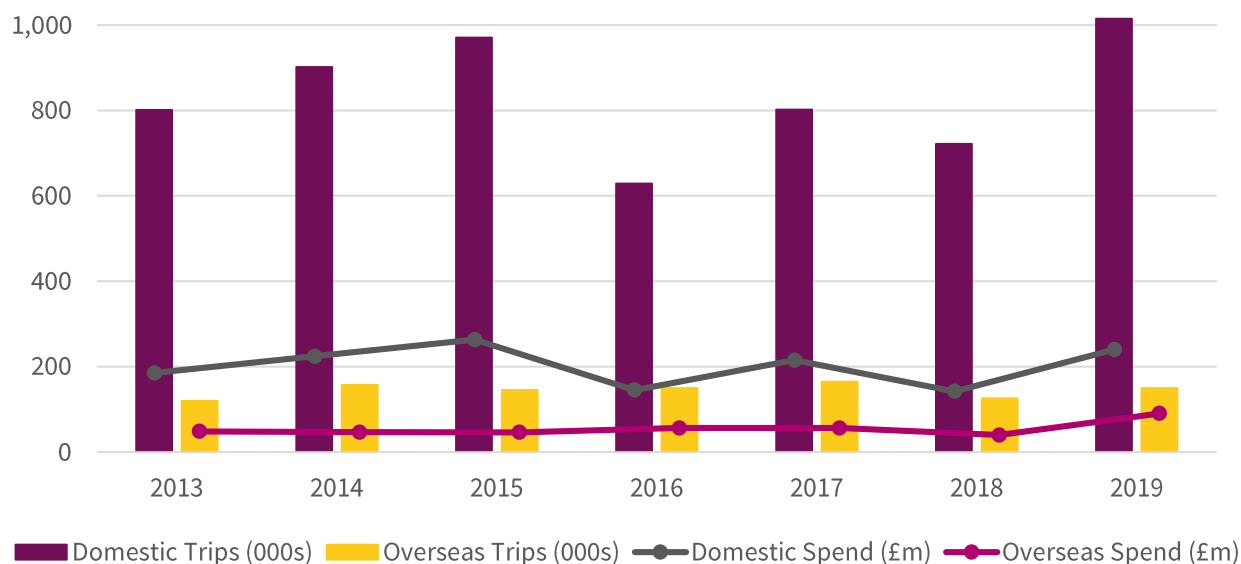


# Visitors to Argyll & the Isles

## Historical Trend Information | 2013 - 2019

In 2019, total overnight trips and spend in Argyll and the Isles were the **highest in seven years**. Annual tourism performance in the region is **predominantly driven by domestic travel** which exhibits much higher annual fluctuations than international travel. In 2019, domestic overnight trips and tourism expenditure were respectively **41%** and **43% above** their annual average levels for the 2016-2018 period. Up until 2019, international tourism to Argyll and the Isles appeared to be much more predictable, with number of trips typically totalling about 150,000 per year. International spend in 2019 was a **record-high**, partially due to large increases in bednights and therefore average length of stay.

### 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)	801	902	971	629	802	722	1,015
International (000s)	120	157	145	150	165	126	150
Total Overnight (000s)	921	1,059	1,116	779	967	848	1,165

Sources: GBTS, IPS.

### Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	185	224	263	145	215	142	240
International (£m)	48	46	46	56	56	40	90
Total Overnight (£m)	233	270	309	201	271	182	330

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](http://www.visitbritain.org) (Insights & Statistics section).

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