



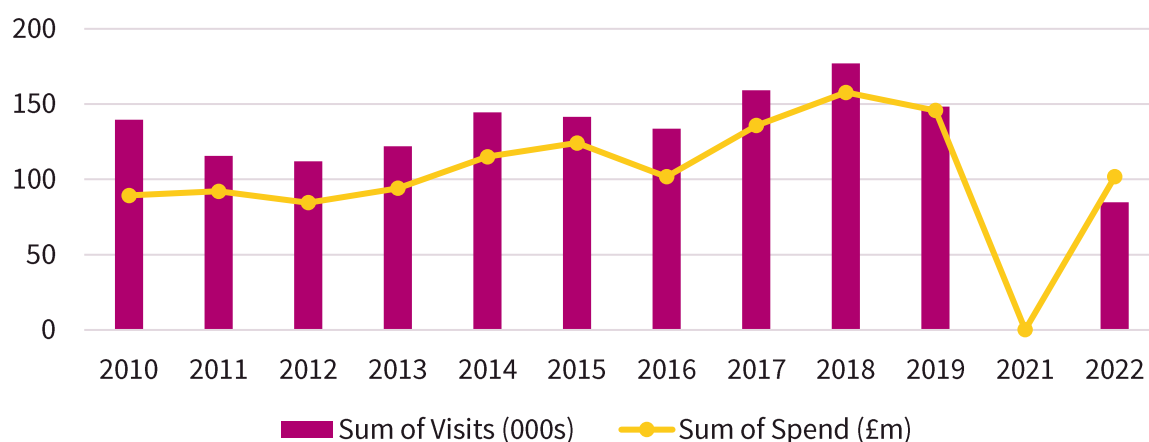
Insight Department:
Australia Factsheet | 2022

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INSIGHT DEPARTMENT: AUSTRALIA FACTSHEET 2022

In 2022, Australia was Scotland's twelfth largest international source market by number of visits, seventh by expenditure and fifth by number of nights. Australians accounted for 3% of all overseas visits and 3% of all overseas spend in Scotland. 2022 saw a lower return versus pre-pandemic levels for both number of visits and spend. Australian borders remained closed for two years during the COVID-19 pandemic, opening again in February 2022. It is likely that during this time, more Australians learned to favour domestic tourism, and this may have had a lingering effect on their travel in 2022.

Visits and spend over time



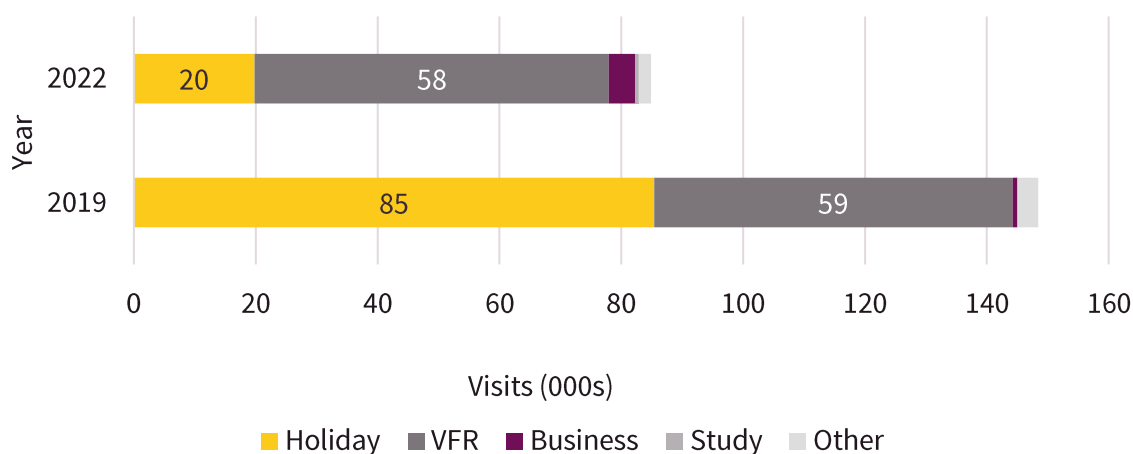
The total number of visits decreased by 43% from pre-pandemic levels, reaching record lows over the last decade. The total number of nights decreased by 21%, while total tourism expenditure by Australians decreased by 30%, reaching almost the lowest point in a decade.

Year	Visits	Nights	Spend (£m)
2019	148,000	1,706,000	146
2022	85,000	1,349,000	102
Change	-43%	-21%	-30%

Visitors from Australia spent on average £218 more during their visit compared to 2019. Although the average length of visit was 38% higher than pre-pandemic, increasing from 11.5 to 16 nights, the average spend per night was 12% lower at £75. This is likely due to an increase in the proportion of visits to see friends or relatives, which tend to be lower spending visits, as well as a significant decrease in holiday visits to Scotland.

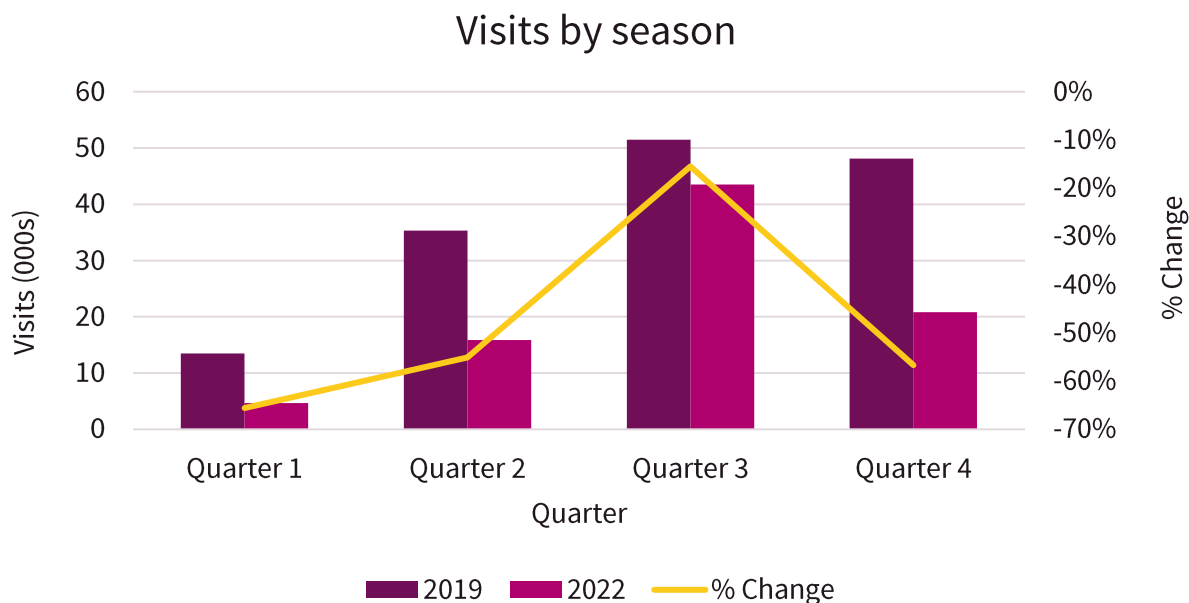
Year	Spend/visit	Nights/visit	Spend/night
2019	£982	11.5	£85
2022	£1,199	15.9	£75
Change	22%	38%	-12%

Visits by purpose of visit



One-quarter of all visits were for the purpose of taking holidays, while around two-thirds were visits to friends or relatives and 5% business visits. There was a significant shift in visit intention compared to pre-pandemic times, where previously 40% of Australian visits were to see friends or relatives, and more than half were holidays. These proportions shifted in 2022, as more Australians favoured domestic holidays, contributing to the reduction in overall visitors from Australia. There was also a marginal shift in business visits, which increased from 0% in 2019 to 5% in 2022.

Purpose of visit	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Business	1	0%	4	5%
Holiday	85	58%	20	23%
VFR	59	40%	58	69%
Study	0	0%	1	1%
Other	3	2%	2	2%



In 2022, Q3 was by far the most popular period for Australian visitors to travel to Scotland, with 51% of visits taking place between July and September. Despite Q3 being the most popular season for Australian visitors in the past, traditionally there was a much more even spread of visits between quarters two, three and four. The Australian visitor pattern in 2022 mirrors many of the other international markets, who also favour the warmer summer months, between July and September.

Season	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Quarter 1	13	9%	5	5%
Quarter 2	35	24%	16	19%
Quarter 3	51	35%	44	51%
Quarter 4	48	32%	21	25%

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About this data

All data is sourced from the International Passenger Survey by the Office for National Statistics. Refer to the [ONS website](#) for more on IPS methodology.

Important Notice On Continued Impact of COVID in relation to IPS Data Collection

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some seaports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [visitbritain.org](https://www.visitbritain.org) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see [visitbritain.org](https://www.visitbritain.org) for more information.

Please refer to the [ONS website](#) for the official release and more information on IPS methodology and UK outbound travel and for Full Year 2022 details are on this [ONS page](#).

Appendix

International Passenger Survey 2022

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS).

Information about the survey can be found on the VisitBritain website

www.visitbritain.org (Insights & Statistics section) or the Office for National Statistics website www.statistics.gov.uk/hub/index.html.

Sample Sizes: Some analysis within this report may be based on small sample sizes. 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 (Insights & Statistics section).

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