



Insight Department:
Grampian Factsheet | 2019
(Aberdeen City, Aberdeenshire & Moray)

Published: December 2020





Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Grampian region including Aberdeen City, Aberdeenshire and Moray. 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.
- **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.
- **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 purpose of travel, seasonality and average duration of trips.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Both international and domestic visitor figures are reported at Grampian level to allow for summing of figures and comparative analysis. While domestic figures are also available at local authority level (provided on pages 7 and 8), international figures are only available for Grampian as a whole and for the City of Aberdeen council area.

This report starts with an **overall** evaluation of Grampian tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region and, if figures allow, provides sub-regional or council area breakdown. 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 Grampian

Latest Figures



Drum Castle, Aberdeenshire
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Overall Tourism Summary: Visits, Nights and Spend in Grampian, 2019

VISITS BREAKDOWN	Visits		Nights		Spend	
	000s	% Change 2018/19	000s	% Change 2018/19	£m	% Change 2018/19
Europe	163	-15%	641	-39%	78	+1%
North America	36	-33%	123	-54%	13	-59%
Rest of World	30	-52%	226	-32%	23	-32%
Total International Overnight	230	-25%	990	-40%	114	-20%
Scotland	850	+32%	2,405	+52%	138	+53%
Rest of Great Britain	243	-51%	1,039	-60%	65	-34%
Total Domestic Overnight	1,093	-4%	3,444	-18%	203	+7%
Total Overnight Tourism	1,323	-8%	4,434	-24%	317	-4%
Total Day Tourism	14,603	-5%	N/A	N/A	539	+36%
Grand Total	15,926	-6%	4,434	-24%	856	+18%

Sources: IPS/GBTS/GBDVS, 2019. 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.

Visitors to Grampian

Tourism Performance | 2019

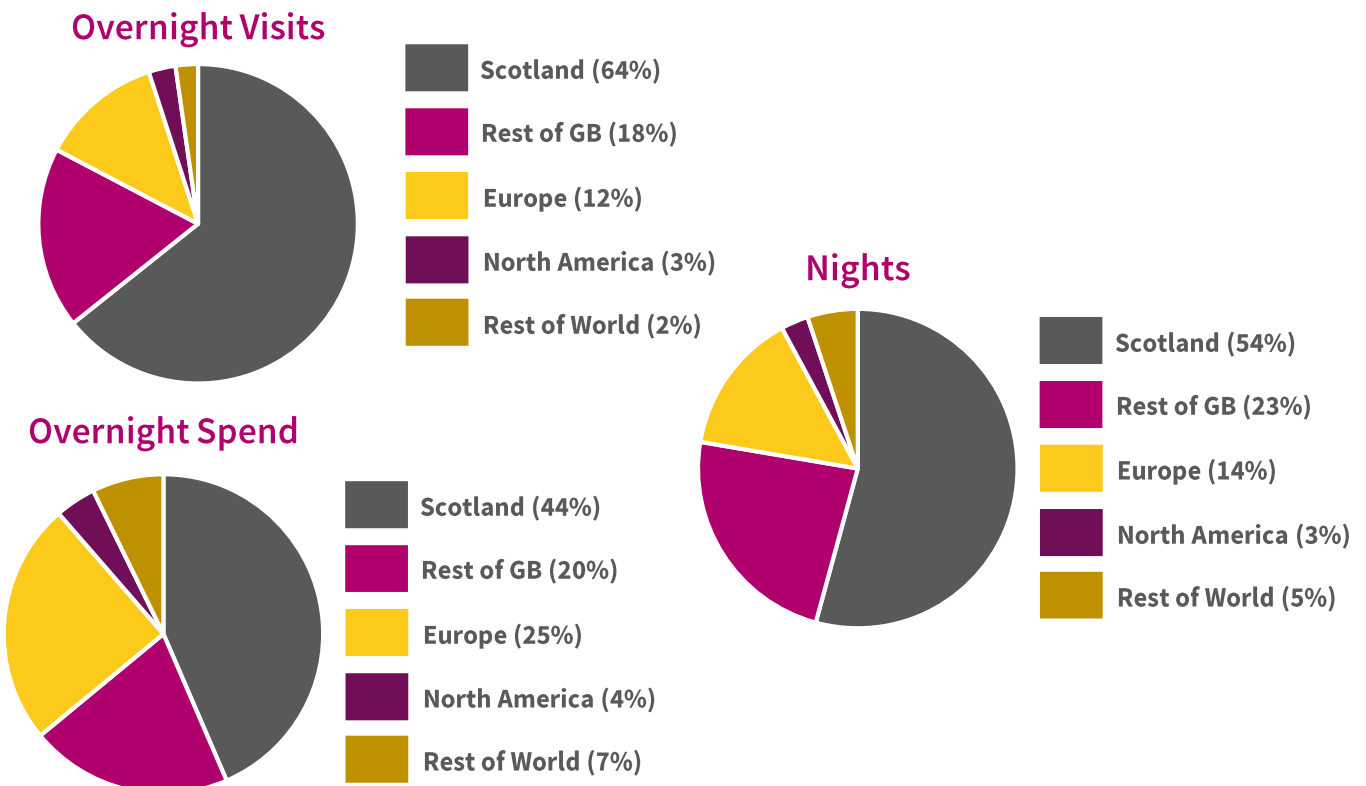
In 2019, Grampian attracted **8% of all overnight visits** and **11% of all day trips** in Scotland. In terms of tourism expenditure, these shares were 5% and 9%, respectively.

After growing substantially in 2018, **overnight tourism** in Grampian **declined** in 2019. Overnight trips went down to 1.3 million (-8%) and overnight spend to £317 million (-4%). At 4.4 million, bednights decreased more significantly by 24%, indicating a drop in visitors' average length of stay.

These figures were compounded by a trend already observed in 2018 – **rising numbers of Scottish visitors** and **decreasing numbers of international travellers** to Grampian. While overseas visits declined by a quarter, trips by Scottish residents rose by a third in 2019. This is reflected in the region's visitor mix, where residents of Scotland made **64% of all overnight trips**, up from 45% in 2018. This massive increase in market share was also driven by a drop in English and Welsh visitors who undertook a quarter of a million trips to Grampian in 2019 – twice less than in 2018.

The decrease in international trips to Grampian was mostly result of a drop in long-haul visitors. European travellers – who form the majority of overseas visitors to the region – also declined (-12%), however their spend (+1%) accounted for **a quarter** of all overnight spend in 2019.

The 2019 net increase in tourism expenditure was driven by a **growth in domestic day tourism spend**. Figures suggest it rose to £539 million (+36%) despite a 5% drop in day trips in the region.



Sources: GBTS/IPS, 2019. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

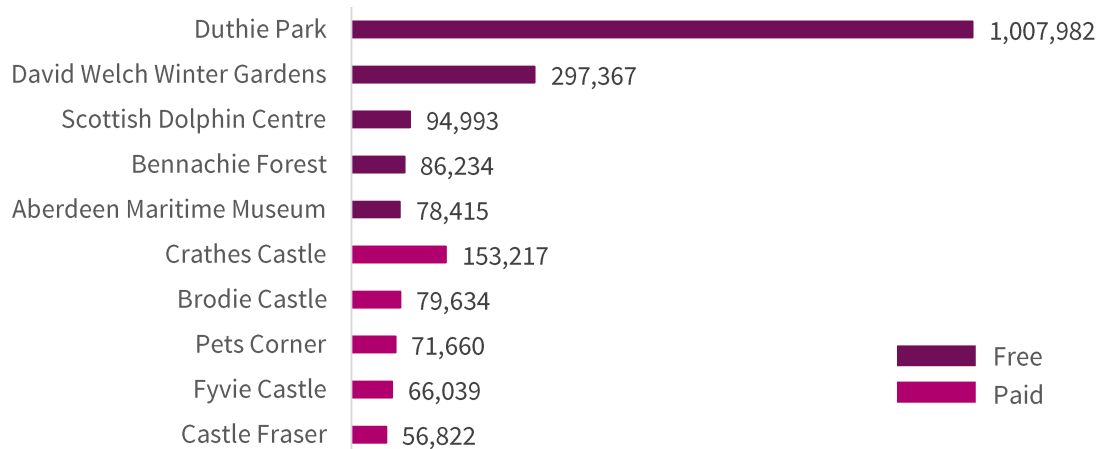
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Aberdeen City	690	+1%	10.9	+5%	234.4	-10%
Aberdeenshire	729	+3%	7.5	+4%	148.7	-15%
Moray	326	0%	3.1	+3%	66.3	+5%
Grampian	1,745	+2%	21.5	+4%	449.4	-10%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit 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 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Grampian (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.

Grampian Occupancy Rates by Accommodation Type and Month, 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	30%	39%	44%	55%	73%	78%	76%	80%	73%	52%	41%	35%	56%
Self-Catering (Unit Occ.)	26%	33%	44%	56%	54%	57%	56%	66%	50%	41%	27%	29%	45%
Hostel (Bed Occ.)	13%	27%	29%	40%	48%	43%	43%	49%	43%	36%	22%	20%	35%

Source: SAOS, 2019.

II. International Visitors to Grampian Overnight Tourism

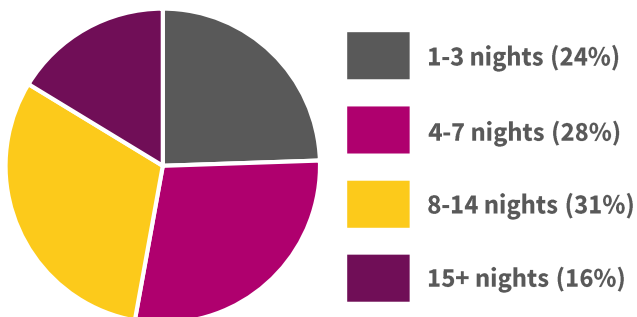
In 2019, Grampian attracted **6.6% of all international visits** and **4.5% of the total overseas spend** in Scotland. International overnight trips to the region were 230,000 which marks a **25% decrease** from 2018. Bednights were just under a million (-40%), while spend totalled at £114 million (-20%). This indicates that the average overseas resident spent more money during their trip to Grampian (£496, +7%), despite staying less time compared to 2018 (4.3 nights, -20%). While going on a holiday is the most popular reason to travel to Grampian, the share of **business trips** is the highest among all of Scotland’s regions – 29% of all overseas visits in 2017-2019.

National and Regional International Tourism Performance, 2019

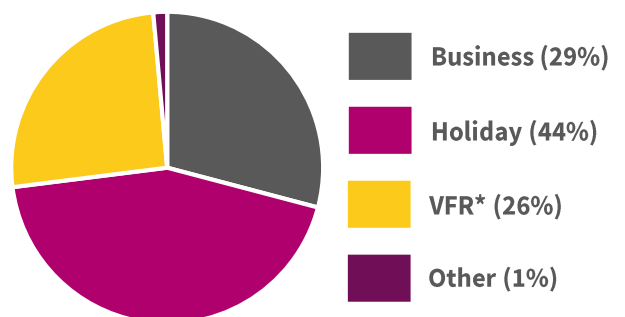
Indicators	Scotland		Grampian		Aberdeen	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	3,460	-7%	230	-25%	158	-35%
Spend (£M)	2,538	+7%	114	-20%	88	-20%
Nights (000s)	27,385	+8%	990	-40%	665	-49%
Average length of stay	7.9 nights	+16%	4.3 nights	-20%	4.2 nights	-22%
Average spend per day	£93	0%	£115	+34%	£132	+59%
Average spend per visit	£734	+15%	£496	+7%	£557	+24%

Source: IPS, 2019.

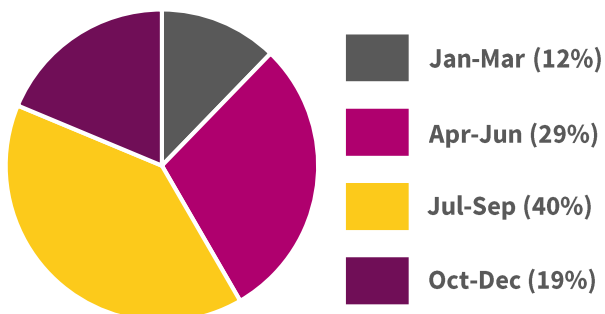
Duration of Stay



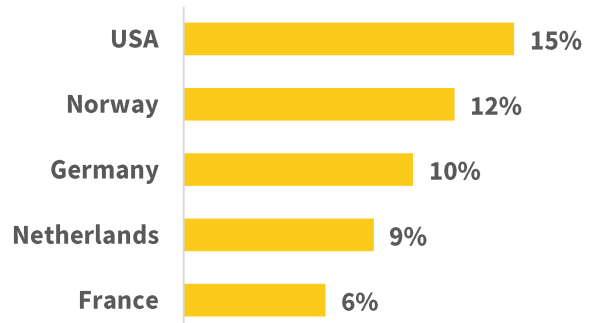
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Grampian. VFR = Visiting friends or relatives.

III. Domestic Visitors to Grampian

Overnight Tourism

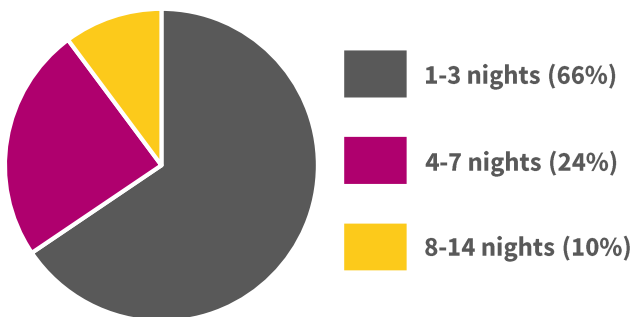
Domestic travellers made 1.1 million overnight trips to Grampian, spending 3.4 million nights and £203 million in 2019. **Visits and bednights decreased** by 4% and 18%, respectively, while **spend grew** by 7% from 2018. This indicates that, like international visitors, British residents spent less time but more money on average during their trip to Grampian. The region accounted for **7.9% of the domestic overnight visits** and **6.3% of the overnight spend** in Scotland in 2019. The domestic visitor profile leans towards slightly older travellers when compared to the national average, with over-45s making up 65% of the domestic overnight trips to Grampian in 2017-2019.

Domestic Overnight Tourism, 2019

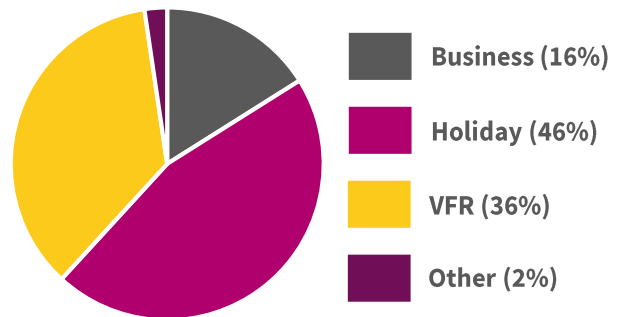
Indicators	Scotland		Grampian		Aberdeen		Aberdeenshire	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	13,810	+17%	1,093	-4%	581	+9%	381	-20%
Spend (£M)	3,200	+16%	203	+7%	122	+20%	57	+12%
Nights (000s)	46,413	+15%	3,444	-18%	1,651	-4%	1,204	-24%
Average length of stay	3.4 nights	-2%	3.2 nights	-15%	2.8 nights	-12%	3.2 nights	-4%
Average spend per day	£69	+1%	£59	+31%	£74	+25%	£47	+46%
Average spend per visit	£232	-1%	£186	+12%	£210	+10%	£150	+40%

Source: GBTS, 2019.

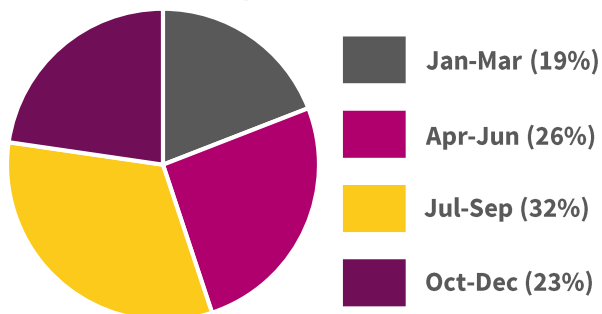
Duration of Stay



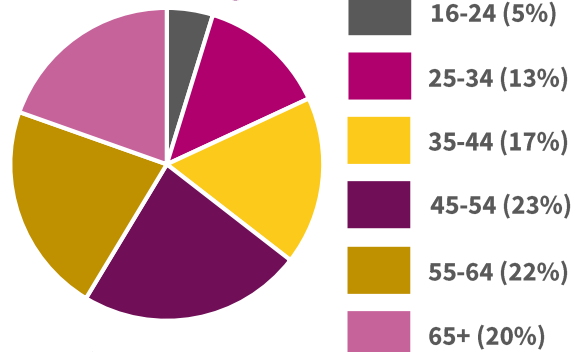
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Grampian.

Domestic Day Visits to Grampian

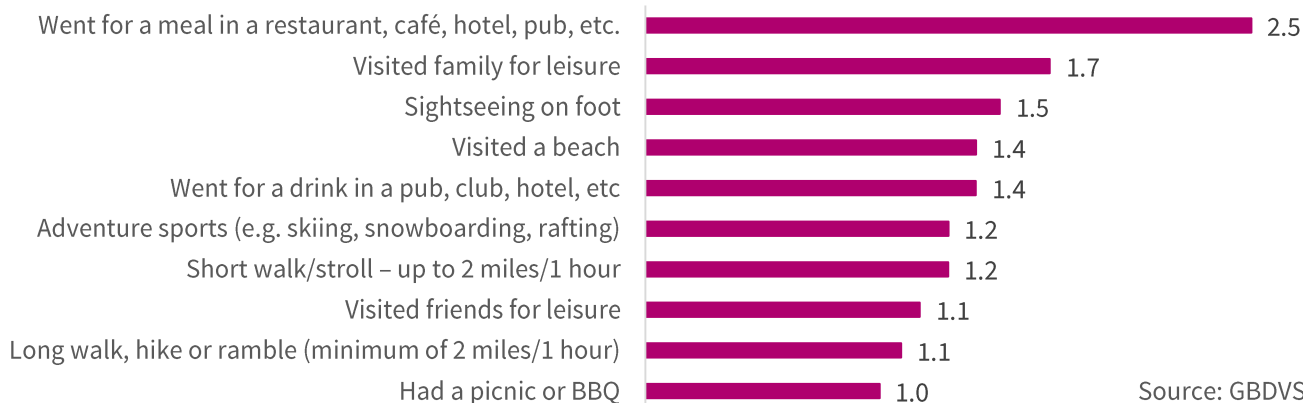
Tourism Performance and Activities

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%
Grampian	14.7	-3%	491	-1%
Aberdeen	6.5	-5%	270	0%
Aberdeenshire	5.8	+2%	173	+8%
Moray	2.4	-8%	48	-23%

Source: GBDVS. Figures may not sum up due to rounding.

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



Source: GBDVS.



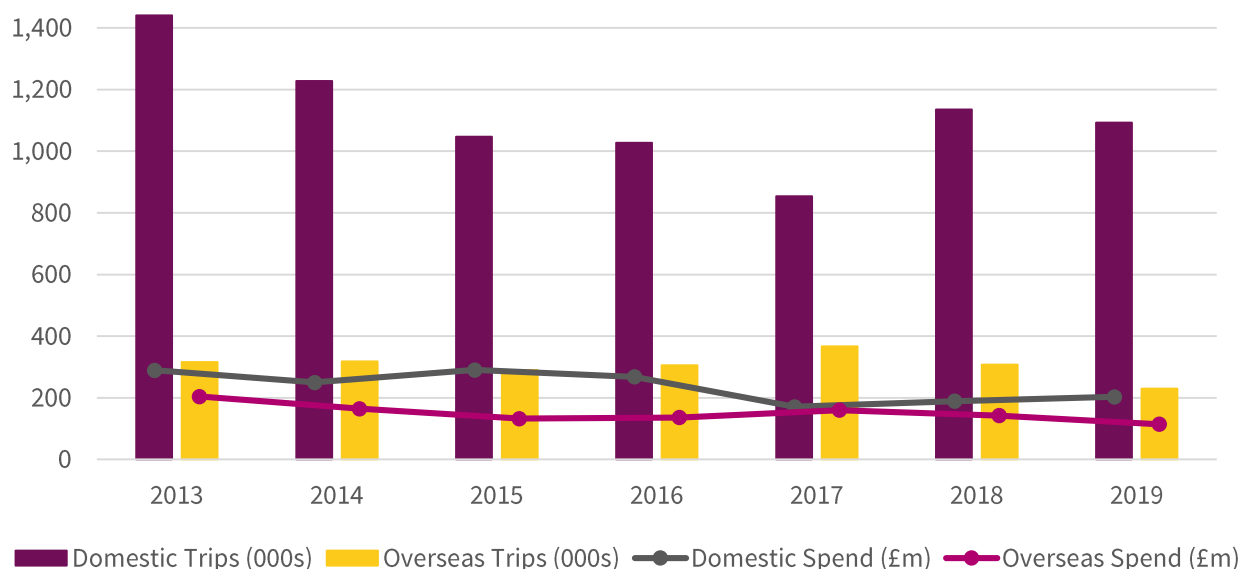
Northern Lights over Cullen Bay

Visitors to Grampian

Historical Trend Information | 2013 - 2019

In 2019, the number of **overnight trips** to Grampian was nearly identical to the **average for 2015-2019**. Overnight spend was 12% below the average for the same period. This was mostly due to the decline in international visits and expenditure which in 2019 were respectively the **lowest** and the second lowest over the last decade. The volume of **domestic travel**, on the other hand, was **second highest since 2015**. Despite the decrease in English and Welsh travellers in 2019, domestic overnight spend in Grampian continued to grow for a second year in a row due to the good performance of the Scottish market.

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)	1,441	1,228	1,047	1,027	854	1,135	1,093
International (000s)	316	318	290	306	367	308	230
Total Overnight (000s)	1,757	1,546	1,337	1,333	1,221	1,443	1,323

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	289	250	290	268	171	189	203
International (£m)	204	165	133	136	160	142	114
Total Overnight (£m)	493	415	423	404	331	331	317

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 (Insights & Statistics section).

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