



Insight Department:
Highland Factsheet | 2019

Published: December 2020





Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Highland region. 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. Most international and domestic figures refer to the Highland 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 Highlands and Islands region including the following local authorities: Highland, Eilean Siar, Orkney Islands, Shetland Islands.

This report starts with an **overall** evaluation of Highland 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 the Highlands

Latest Figures



Cawdor Castle and Gardens
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Overall Tourism Summary: Visits, Nights and Spend in the Highlands, 2019

VISITS BREAKDOWN	Visits		Nights		Spend	
	000s	% Change 2018/19	000s	% Change 2018/19	£m	% Change 2018/19
Europe	243	-10%	1,259	+29%	92	+15%
North America	152	-17%	515	-42%	87	-6%
Rest of World	64	-24%	255	-6%	23	-29%
Total International Overnight	459	-15%	2,029	-5%	202	-2%
Scotland	1,541	+63%	4,974	+43%	291	+54%
Rest of Great Britain	906	+21%	4,513	+21%	284	+21%
Total Domestic Overnight	2,448	+45%	9,487	+32%	575	+35%
Total Overnight Tourism	2,907	+30%	11,516	+23%	777	+23%
Total Day Tourism	9,579	-15%	N/A	N/A	776	+80%
Grand Total	12,486	-8%	11,516	+23%	1,553	+46%

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 the Highlands

Tourism Performance | 2019

2019 was a very good year for tourism in the Highlands. The volume and value of overnight travel to the region exceeded any other year back to 2013. The Highlands attracted **17% of all overnight trips** and **13% of the total overnight tourism expenditure** in Scotland.

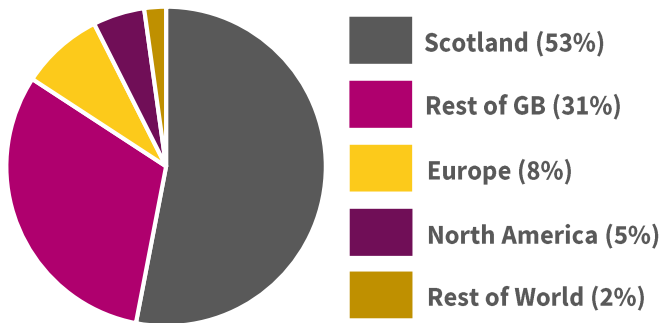
At 2.9 million, the number of overnight visits was 30% higher than in 2018. Bednights (11.5 million) and overnight spend (£777 million) also increased, by 23% each. The **growth** in overnight tourism in the Highlands was much **more significant** than the national average, where visitor figures increased by 11% to 12%.

The driver behind this strong regional performance in 2019 was domestic tourism. **Residents of Scotland** travelled much more to the Highlands compared to previous years, and while this was observed across many Scottish regions in 2019, the Highlands also witnessed a big increase in overnight tourism from residents of **England and Wales**. Trips, bednights and expenditure of travellers from the rest of Great Britain all **increased** by 21% from 2018.

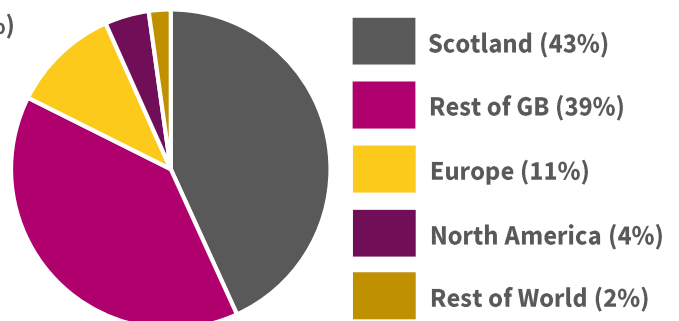
International travel to the Highlands **declined** in 2019, with number of trips and bednights dropping by 15% and 5%, respectively. This had little impact on overseas spend in the region which decreased by only 2% from 2018. The decline in international visitors was mostly observed across long-haul markets.

Figures indicate a massive **increase in domestic day tourism spend** in the region. Between 2017 and 2019, it was £571 million per year on average, up from £334 million per year in 2014-2016.

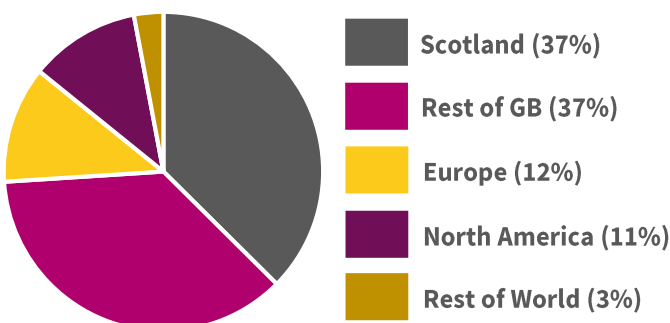
Overnight Visits



Nights



Overnight Spend



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

Regional Tourism Performance

Local Statistics

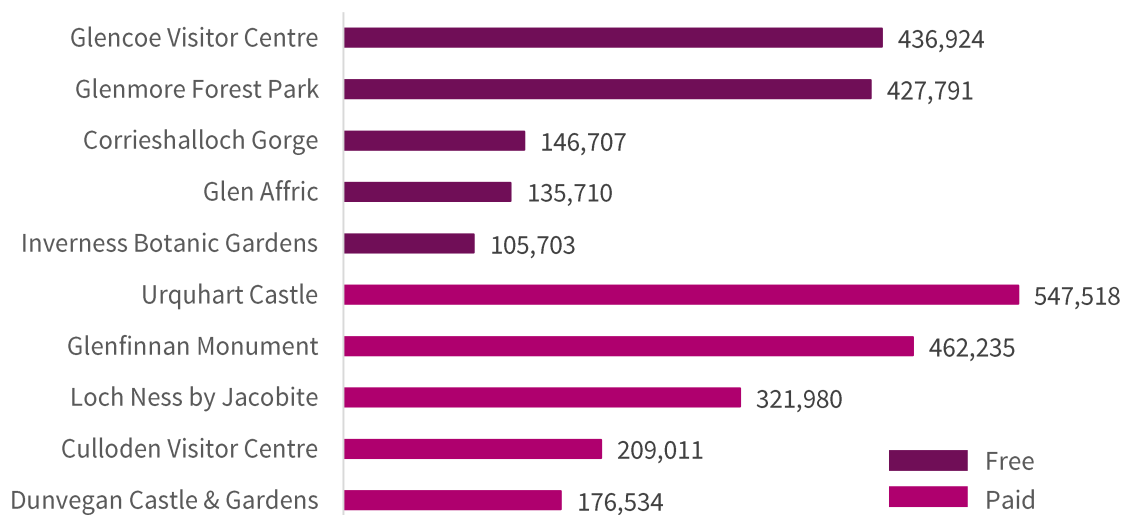
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Highland	1,525	+6%	16.4	+4%	320	0%

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 the Highlands (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.

Highland 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.)	43%	48%	53%	70%	85%	86%	86%	87%	84%	73%	58%	44%	70%
Guest House/B&B (Room Occ.)	11%	7%	5%	45%	63%	67%	77%	85%	59%	30%	23%	8%	44%
Self-Catering (Unit Occ.)	33%	36%	33%	61%	69%	67%	78%	78%	61%	53%	32%	34%	55%
Hostel (Bed Occ.)	37%	46%	43%	63%	77%	71%	76%	80%	66%	52%	35%	33%	60%

Source: SAOS, 2019.

II. International Visitors to the Highlands

Overnight Tourism

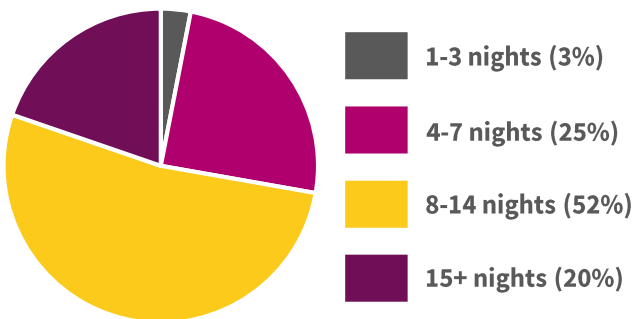
In 2019, the Highlands welcomed **less international visitors** than in 2018. Trips and expenditure dropped by 15% and 2%, respectively. Despite that, the region remained one of the top tourist destinations, accounting for **13% of all international trips** and **8% of the total overseas spend** in Scotland. 2019 also saw growth in international visitors' average length of stay (+11%) and spend per trip (+15%). Between 2017 and 2019, 86% of all overseas visits to the Highlands were **holiday trips** – the highest proportion across all of Scotland's regions. Nearly half of all visits occurred in the summer and while most travellers came from Europe, USA remained the largest single source market.

National and Regional International Tourism Performance, 2019

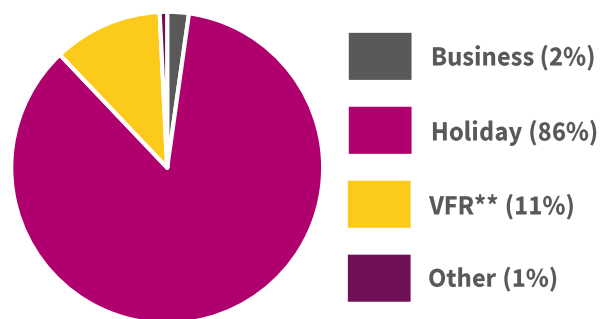
Indicators	Scotland		Highland	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	3,460	-7%	459	-15%
Spend (£M)	2,538	+7%	202	-2%
Nights (000s)	27,385	+8%	2,029	-5%
Average length of stay	7.9 nights	+16%	4.4 nights	+11%
Average spend per day	£93	0%	£100	+4%
Average spend per visit	£734	+15%	£441	+15%

Source: IPS, 2019.

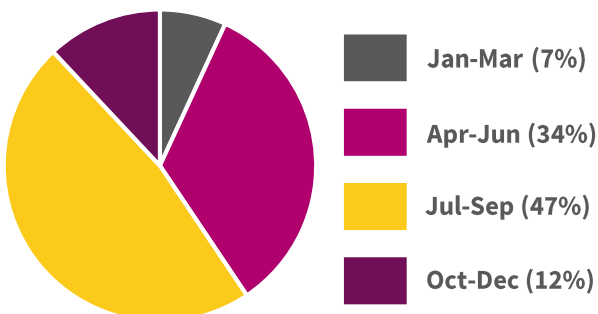
Duration of Stay*



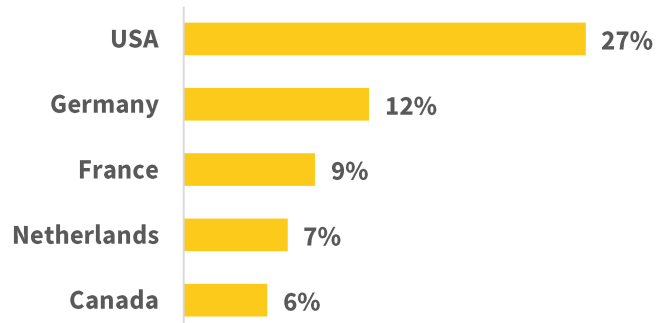
Purpose of Travel



Seasonality*



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019). Purpose of travel and top market data refers to the Highland region only. *Duration of stay and seasonality data refers to the wider Highlands & Islands region (including Eilean Siar, Orkney and Shetland Islands). **VFR = Visiting friends or relatives.

III. Domestic Visitors to the Highlands

Overnight Tourism

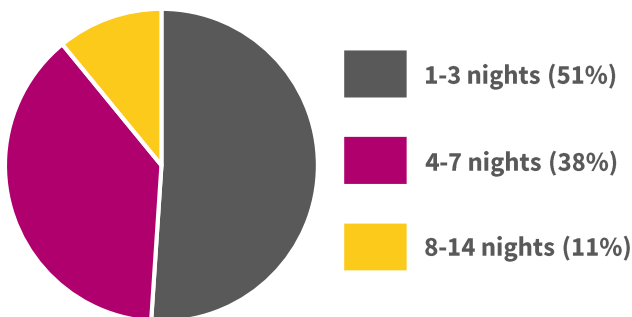
There was a strong **surge in domestic tourism** to the Highlands in 2019. Overnight trips reached just under 2.5 million (+45%) and associated expenditure totalled £575 million (+35%). These figures represent **18% of the domestic overnight visits and spend** nationally. Bednights also increased significantly (+32%), albeit to a slightly lesser extent, indicating a 9% drop in visitors' average length of stay. Like international travellers, between 2017 and 2019 most British residents went to the Highlands for a **holiday** and summer was the most popular season to visit. However, **seasonality** of domestic trips was **less pronounced**, with 38% of all visits made between October and March.

Domestic Overnight Tourism, 2019

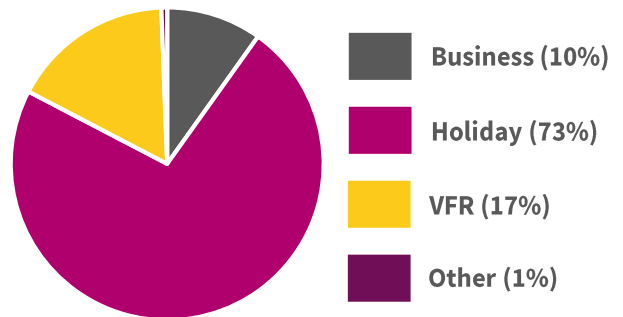
Indicators	Scotland		Highland	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	13,810	+17%	2,448	+45%
Spend (£M)	3,200	+16%	575	+35%
Nights (000s)	46,413	+15%	9,487	+32%
Average length of stay	3.4 nights	-2%	3.9 nights	-9%
Average spend per day	£69	+1%	£61	+3%
Average spend per visit	£232	-1%	£235	-7%

Source: GBTS, 2019.

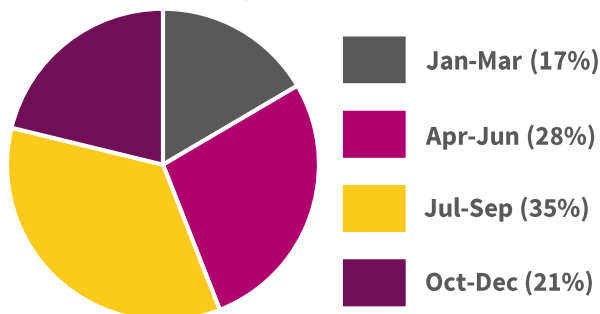
Duration of Stay



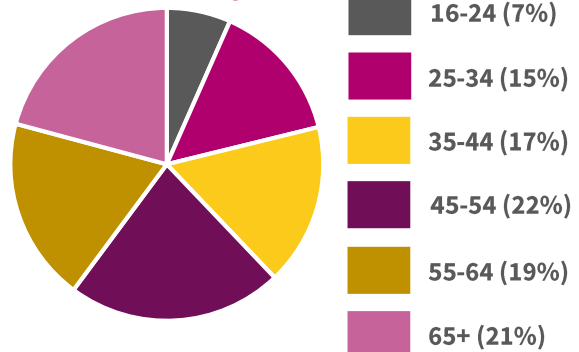
Purpose of Travel



Seasonality



Visitors' Age



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

Domestic Day Visits to the Highlands

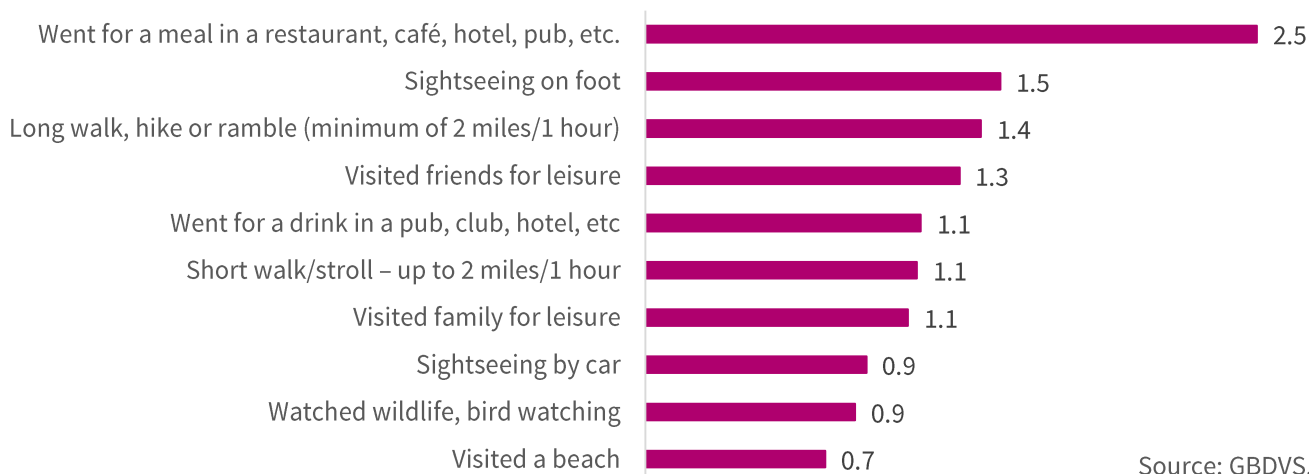
Tourism Performance and Activities

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%
Highland	11.6	-4%	571	+38%

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

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



Source: GBDVS.

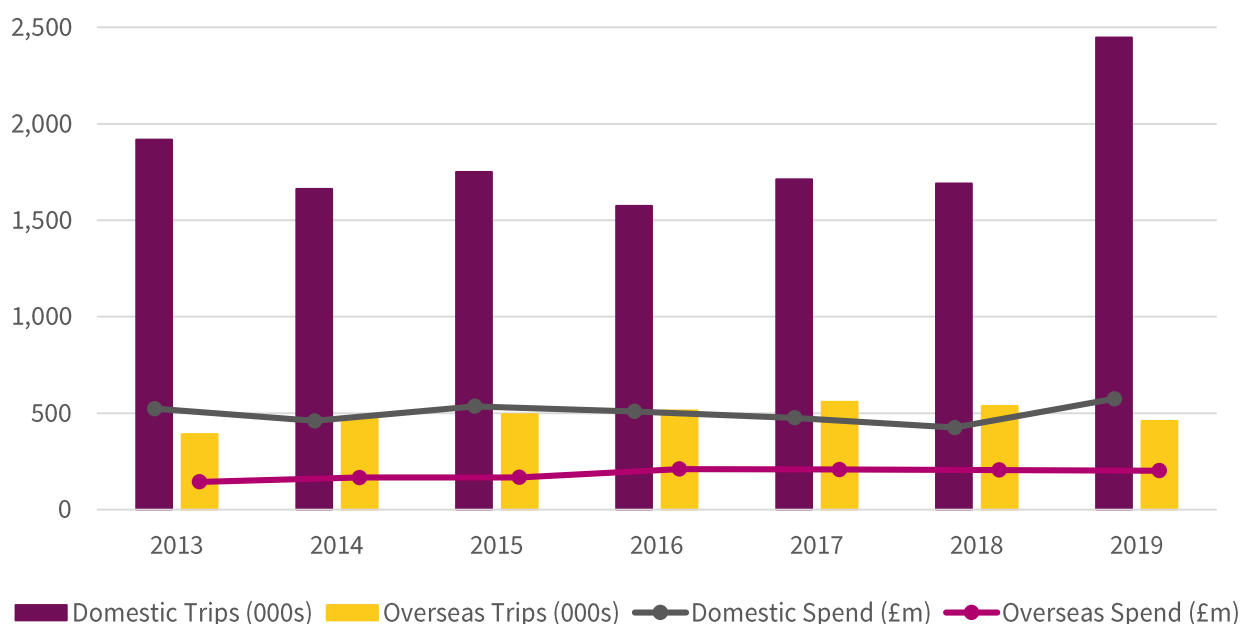


Visitors to the Highlands

Historical Trend Information | 2013 - 2019

The strong performance of domestic tourism in the Highlands in 2019 is even more notable when viewed in the context of the past several years. The number of overnight **trips by British residents** to the region was **at least 28% higher** than in any other year back to 2013. After decreasing for three years in a row, **domestic overnight spend also rose to its highest** since 2013. The annual fluctuations in international trips appear to be more significant than the ones in **overseas expenditure** which has **plateaued** at just over £200 million since 2016.

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)	1,918	1,662	1,751	1,575	1,713	1,690	2,448
International (000s)	392	481	495	514	560	538	459
Total Overnight (000s)	2,310	2,143	2,246	2,089	2,273	2,228	2,907

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	523	460	536	509	476	425	575
International (£m)	145	166	167	210	208	205	202
Total Overnight (£m)	668	626	703	719	684	630	777

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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