

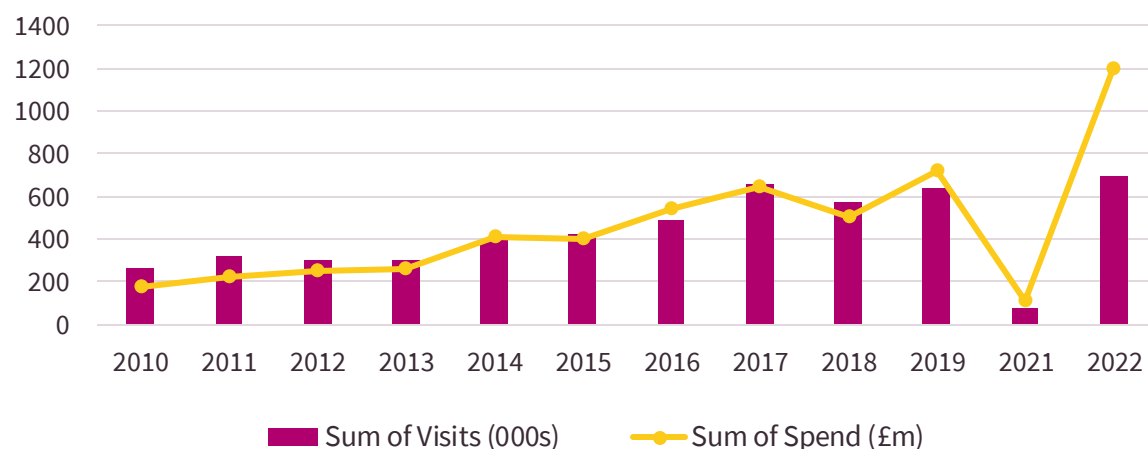


Insight Department:
USA Factsheet | 2022

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The USA visitor market to Scotland made a strong recovery following the coronavirus (COVID-19) pandemic and associated travel restrictions, surpassing pre-pandemic levels for both visits and spend. In 2022, the USA was Scotland's largest international source market by number of visits, expenditure and nights. American visitors accounted for 21% of all overseas visits and 38% of all overseas spend in Scotland.

Visits and spend over time



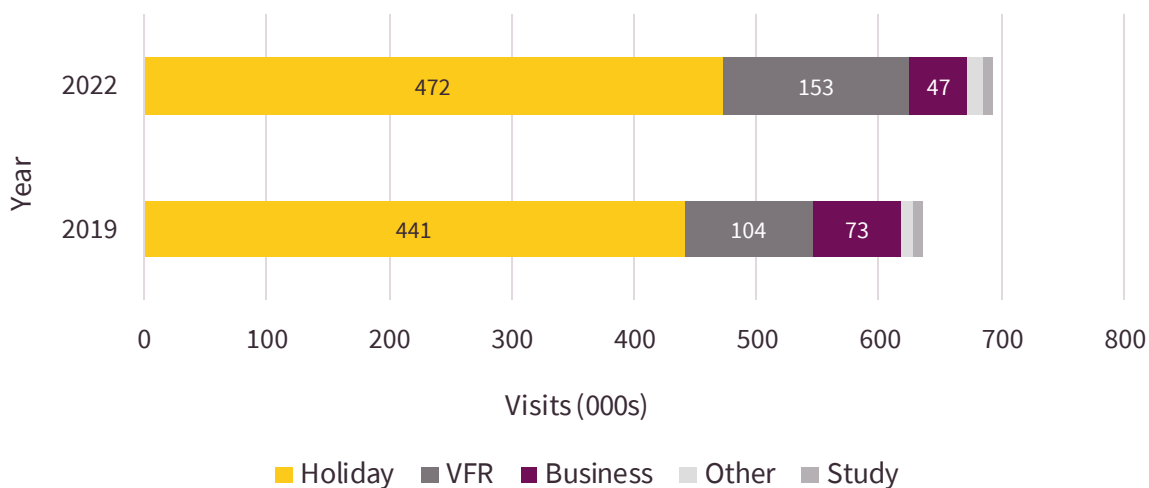
The total number of visits increased by 9% from pre-pandemic levels, reaching a record high over the last decade. In 2022, USA visitors spent £1,197m up 67% on 2019 (in nominal terms). Taking inflation into account, visitor spend would still have been 48% above 2019 levels, equivalent to £1,060m in 2019 prices. The total number of nights increased by 55% compared to 2019.

Year	Visits	Nights	Spend (£m)
2019	636,000	4,246,000	717
2022	693,000	6,588,000	1,197
Change	9%	55%	67%

The average spend per visit was £1,728 in 2022 compared to £1,128 in 2019, up 53% in nominal terms and 36% in real terms (equivalent to £1,531 in 2019 prices). Although the average spend per night was only 8% higher than pre-pandemic, the average length of visit was 42% greater, at 9.5 nights. This is likely due to an increase in the number of American visitors to Scotland who visited friends or relatives. Such visitors are more likely to stay for longer periods and spend less per day compared to holidaymakers.

Year	Spend/trip	Nights/trip	Spend/night
2019	£1,128	6.7	£169
2022	£1,728	9.5	£182
Change	53%	42%	8%

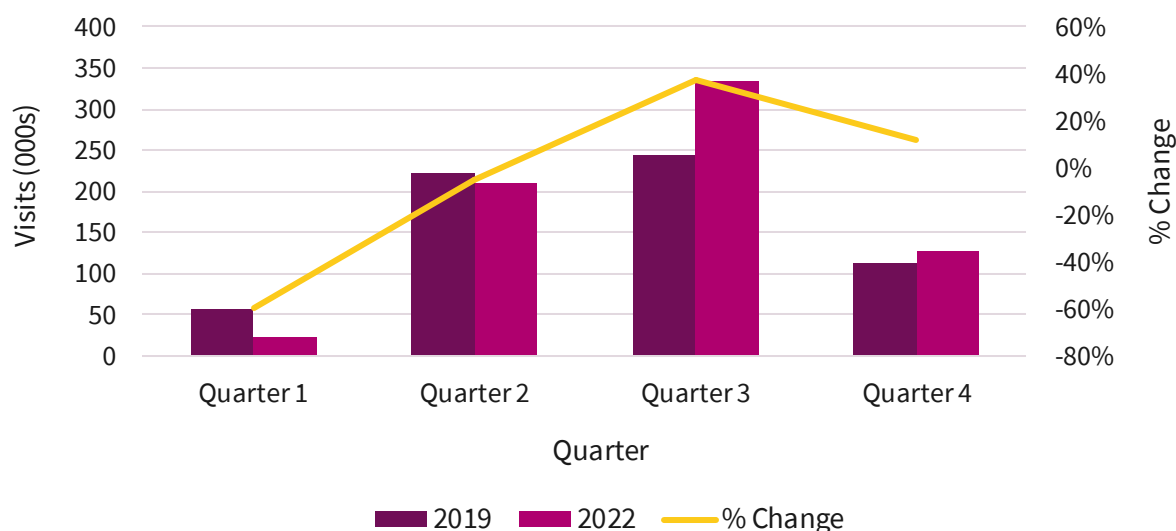
Visits by purpose



More than two-thirds of all visits were for the purpose of taking a holiday, while around one-fifth were to visit friends or relatives and just 7% for business. A shift in trip intention can be seen compared to pre-pandemic times, where there was a higher proportion of business visits and a lower proportion of visitors travelling to see friends or relatives.

Purpose of trip	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Holiday	441	69%	472	68%
VFR	104	16%	153	22%
Business	73	11%	47	7%
Other	9	1%	13	2%
Study	8	1%	8	1%

Visits by season



In 2022, the proportion of visits to Scotland by American visitors decreased slightly in the first two quarters but increased significantly in Q3 compared to the same periods in 2019. Nearly half of all visits took place during the third quarter of the year, between July and September. Traditionally, most travellers from the USA visit Scotland in the summer months when the weather is warmest. The 2022 figures indicate that American travellers are returning to this pattern following a break due to the COVID-related travel restrictions that were in place throughout 2020 and 2021.

Season	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Quarter 1	57	9%	23	3%
Quarter 2	222	35%	210	30%
Quarter 3	243	38%	334	48%
Quarter 4	113	18%	127	18%

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](#) 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](#) 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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