

SEABIRDS FLY BENEATH A BLUE SKY OVER
LOSSIEMOUTH, MORAY



**INSIGHT DEPARTMENT
SCOTLAND'S TOURISM PERFORMANCE
QUARTER 3 / 2017**

18th January 2018

TOURISM STATISTICS Q3/2017

Tourism Visitor Volume and Value to Scotland

Domestic Overnight Tourism ^a Quarter 3	2015	2016	2017	% Change 2017/16	% Change 2017/15
Trips (Millions)	3.936	3.216	3.540	+10.07	-10.06%
Spend (£ Millions)	£1,157	£847	£1,056	+24.68	-8.73%

Domestic Overnight Tourism ^a January to September	2015	2016	2017	% Change 2017/16	% Change 2017/15
Trips (Millions)	9.559	8.771	8.292	-5.46%	-13.25%
Spend (£ Millions)	£2,632	£2,202	£2,194	-0.36%	-16.64%

International Tourism ^b Quarter 3 (Jul-Sep)	2015	2016	2017	% Change 2017/16	% Change 2017/15
Trips (Thousands)	1,052	1,099	1,260	14.61%	19.77%
Spend (£ Millions)	£750	£854	£890	4.27%	18.67%

International Tourism ^b Quarter 1 + 2 + 3 (Jan-Sep)	2015	2016	2017	% Change 2017/16	% Change 2017/15
Trips (Thousands)	2,135	2,231	2,551	14.31%	19.48%
Spend (£ Millions)	£1,396	£1,561	£1,846	18.25%	32.2%

Tourism Day Trips ^c January to September	2015	2016	2017	% Change 2017/16	% Change 2017/15
Trips (Millions)	111.2	107.5	115.4	7.35%	3.78%
Spend (£ Millions)	£3,307	£3,529	£4,561	29.24%	37.92%

Sources:

a. Great Britain Tourism Survey (GBTS)

Note: Domestic Visitors are residents of Great Britain staying overnight in Scotland.

b. International Passenger Survey (IPS)

c. Great Britain Day Visit Survey (GBDVS)

Quarter 1 = January to March / Quarter 2 = April to June / Quarter 3 = July to September / Quarter 4 = October to December

Interpretation of Tourism Performance Year to September 2017

For the first nine months of 2017, there were 8.3 million trips and £2.2 billion spend by GB residents taking overnight visits to Scotland. (For year to September, domestic tourism to GB as a whole recorded -1.0% in trips and +1.9% in spend). By contrast UK residents took 54.5 million visits abroad in the first nine months of 2017, 3% more than the same period last year and spent £33.5 billion (in nominal terms), up 5% on the year to August 2016. It should be noted that for the three months to September 2017, UK residents took -2.6% fewer trips abroad, the first noted decline in UK outbound for several quarters.

Focusing on domestic tourism to Scotland, overnight trips by GB Residents for holiday purposes increased +8.5% compared to the January to September 2016. Expenditure increased £163 million or 12.7% to £1.5 billion over the same period. Visiting Friends And Relatives declined -10.2% in terms of trips and -11.4% in expenditure compared to the first nine months of 2016. Although the month of September saw strong gains in overnight trips to Scotland for Business Travel overall for the year to September, trips and spend recorded declines from a strong performance in 2016. Tourism Day Visits to Scotland continued to increase in volume and value in the year to September. 115 million day trips were taken in the first nine months of 2017, generating £4.6 billion, an increase on both 2015 and 2016.

International Inbound Markets to Scotland for the year to September Increased 15% in terms of trips and 18% in expenditure. Despite a drop in the North American market in Q3 (Jul-Sep) of -22% following a strong Q3/2016 from this market. Compared to Q3/2015, July to September 2017 saw North American visitors increase by +6%. European Travellers, which saw a decline in Q1-Q3/2016 recovered in the same period for 2017 by 18%, the EU15 cohort growing by 23%. The European performance also increased on that of the same quarters in 2015. European trips growth was also reflected in expenditure with 2017 performance increasing over 2015 and 2016

Sources: Great Britain Tourism Survey, International Passenger Survey, Great Britain Day Visitor Survey

GBTS Methodology Note –

Update 12th October 2017

In 2016, a new data processing platform was introduced to deliver the GBTS survey, and with this new platform, some changes were made to the way that results were calculated for a small number of respondents. This has resulted in a break in the time series reporting for the project.

Further detail about the changes made and guidance about how to interpret results, are found within the 2015-16 Data Processing Changes Explanation document on the VisitScotland.org website. The document provides a comprehensive overview of the changes made, the reasons for these, and the way they have impacted results reporting. (URL: http://www.visitscotland.org/research_and_statistics/tourismstatistics/about_the_surveys.aspx)

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