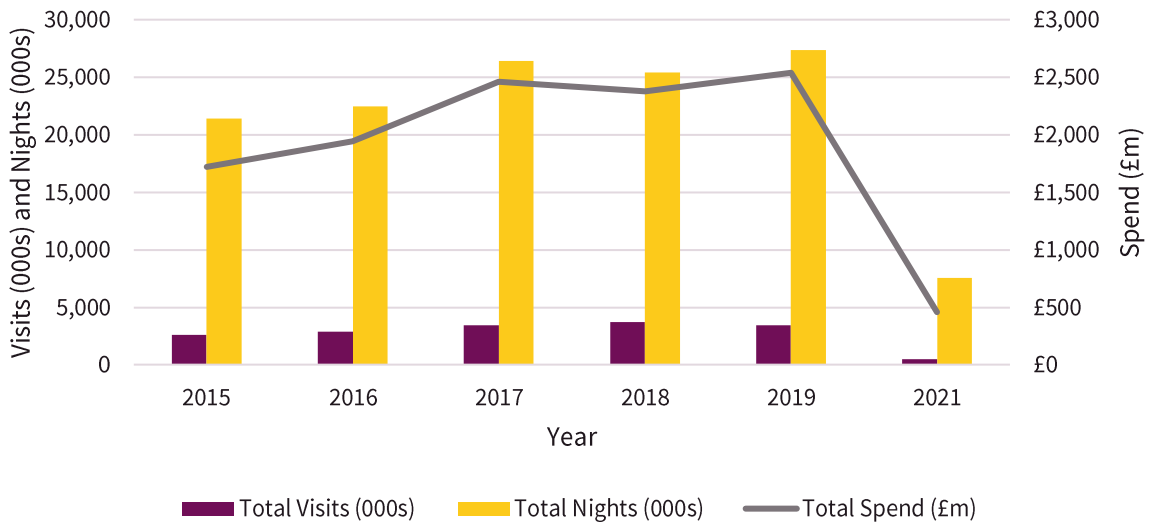


INTERNATIONAL TOURISM PERFORMANCE IN 2021

As international travel recovers from the COVID-19 pandemic and associated travel restrictions, the volume and value of international visits to Scotland in 2021 remains at significantly lower levels than seen up to 2019.

International Tourism Performance 2015-2021



A total of 479,000 visits were made to Scotland by international visitors, staying for 7.6 million nights and spending £459 million. This is an 86% reduction in volume and an 82% reduction in expenditure from 2019.

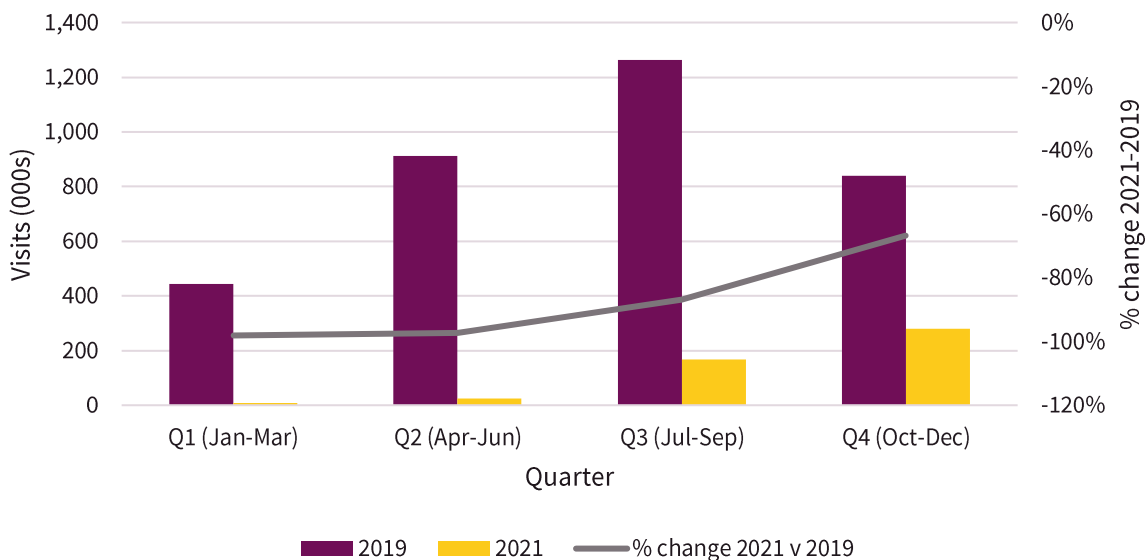
Year	Visits (000s)	Nights (000s)	Spend (£m)
2019	3,460	27,385	£2,538
2021	479	7,586	459
Change on 2019	-86%	-72%	-82%

The average international visitor to Scotland in 2021 spent a total of £958 over a 15.8-day trip with a daily expenditure of £60. The increase in spend per trip is driven by longer stays (15.8 days in 2021 versus 7.9 in 2019), with actual daily expenditure 35% down on 2019 levels.

Year	Spend/trip	Nights/trip	Spend/night
2019	£734	7.9	£93
2021	£958	15.8	£60
Change on 2019	31%	100%	-35%

INTERNATIONAL TOURISM PERFORMANCE IN 2021

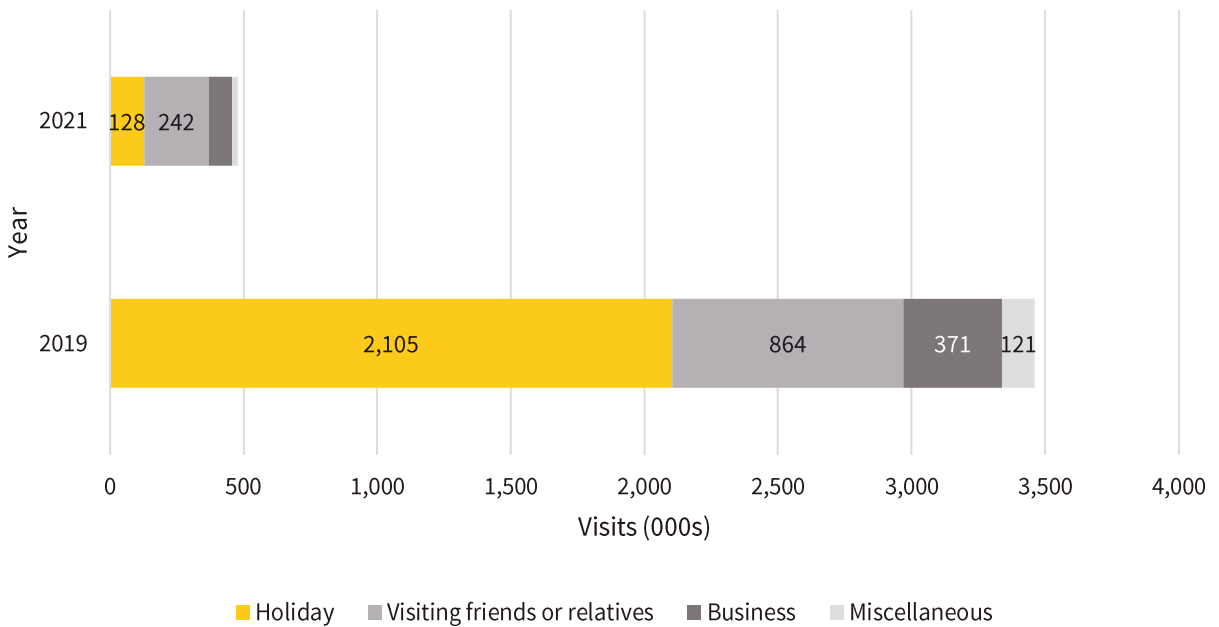
Seasonality of international visits to Scotland



Despite lower overall levels of international visitors, performance has improved throughout 2021 as COVID restrictions eased and confidence to travel increased amongst consumers. Total visits in the last quarter of 2021 (Q4 – October to December) were higher than the traditional peak season of July – September (Q3) for the first time as reported by the IPS.

INTERNATIONAL TOURISM PERFORMANCE IN 2021

Visits by purpose of trip



The purpose of trip motivating international visits to Scotland in 2021 is significantly different to that seen prior to the pandemic. Travelling with the purpose of visiting friends and/or relatives (VFR) makes up half of all visits to Scotland in 2021, compared with 25% in 2019.

Holiday trips in 2021 totalled 6% of pre-pandemic volume and were outperformed by VFR travel in both total volume and against 2019 proportions, despite VFR only achieving 28% of 2019 level of visitation.

This increase in VFR visitors within the visitor mix has resulted in longer stays (16 days) but lower daily expenditure, as spend profile of VFR visitors is likely to include less expenditure on food and drink, accommodation and activities than a traditional leisure visitor.

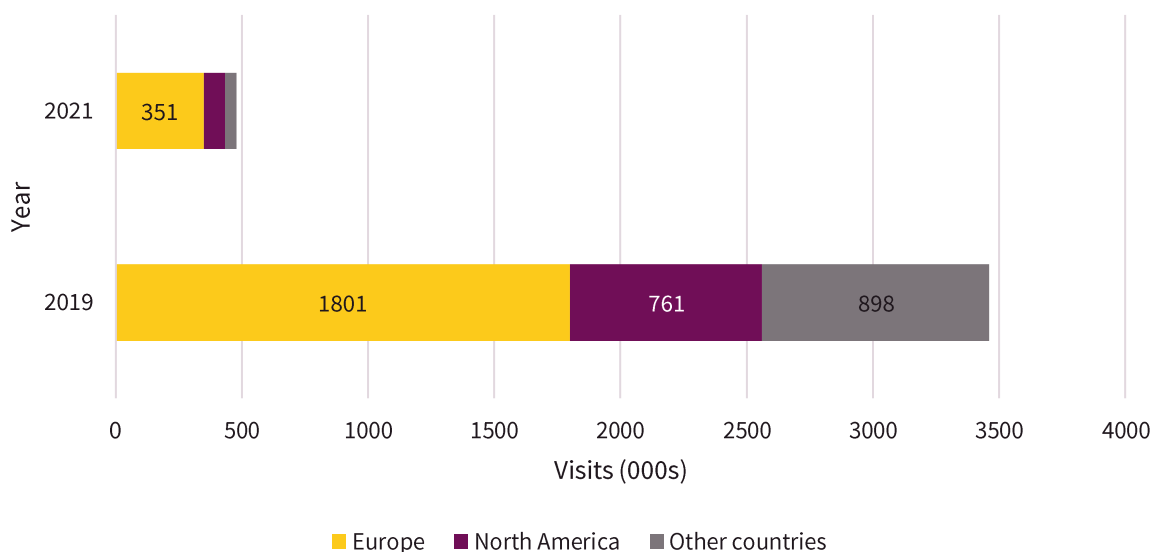
A trend of higher expenditure per trip was seen across all purposes of trip, with holiday expenditure per trip up 26% on 2019 levels, driven by longer stays and a desire to maximise time in destination in line with effort to travel.

INTERNATIONAL TOURISM PERFORMANCE IN 2021

Year	North America	Europe	of which EU	of which EU15	of which other EU	Other countries	Total
2019	761	1,801	1,587	1,389	197	898	3,460
2021	82	351	327	262	64	45	479
Change on 2019	-89%	-81%	-79%	-81%	-68%	-95%	-86%

In line with international [consumer sentiment](#) towards travel to the UK and Scotland, short haul visitors made up the majority (73%) of visits to Scotland in 2021. The volume of visits from the North American market, a traditional market of strength for Scotland, was down 89% on 2019 levels with European markets showing slightly more resilience at 81% down on 2019 levels). “Other countries”, including the previously rapidly growing market of China, were down 95% on pre-pandemic visitor volumes.

Visits (000s) by global region



INTERNATIONAL TOURISM PERFORMANCE IN 2021

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. In producing these results, the ONS have made assumptions that some previous trends have continued, for example, the proportions of passengers travelling for business or holidays. The data was not made available by Mode; therefore, we are unable to compare current AIR data to this period in 2020 and have opted to compare AIR data to 2019 instead.

2021 – revised 2021 published today will contain all collected by the ONS throughout 2021 but with the following caveats that no data was collected for those travelling to the UK by Eurotunnel and data for those arriving from Dover was only collected from Q3. This report covers the regional level data for 2021. No comparisons are made in this report, but you can access regional data for previous years on the regional page on [visitbritain.org](#). The sample for this period is very low so caution should be used when interpreting results.

Please refer to the [ONS website](#) for the official release and more information on IPS methodology and UK outbound travel and for Full Year 2021 details are on this [ONS page](#).

INTERNATIONAL TOURISM PERFORMANCE IN 2021

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