



Insight Department Key Facts on Tourism in Scotland | 2019

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 *Visit
Scotland* | *Alba*TM

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Executive Summary

Key Facts and Trends

Tourism in 2019 Overview

2019 was the **best year for overnight tourism in Scotland over the last decade**. Overnight visits, number of bednights and overnight expenditure all **increased by roughly a sixth** from their 2018 levels. This significant growth was underpinned by a big rise in the number of overnight trips made by Scottish residents, as well as notable increases in the average length of stay and spend per trip of international visitors. UK residents made **14.1 million** overnight visits to Scotland which accounted for 80% of all in 2019. While the share of international trips (**3.5 million**) was 20%, the expenditure generated by overseas visitors amounted to more than £2.5 billion, or 43% of the total overnight spend in Scotland.

At **134 million**, the number of domestic day trips was the lowest in the last nine years. Yet, day trip expenditure rose to **£5.8 billion**, an increase of 6% from 2018.

Overall, 2019 was a good year for accommodation providers, particularly for **touring** and **hostel** businesses where average occupancy rates reached 41% (+7 percentage points) and 60% (+5pp), respectively. Average occupancy rates for self-catering accommodation were the only ones to decrease on national level after rising significantly in 2018. Traditionally, visitor attraction performance varied across regions. In 2019, top attractions in Glasgow, Dundee and the Highlands experienced the biggest increases in visitors.

The visitor economy (as defined by the Scottish Government's "Sustainable tourism" growth sector) expanded again in 2018 (latest available figures). Business units reached **18,095** (+3%), employment rose by **10,500** positions (+5%) to total 217,100, while GVA increased marginally by **£21m** (+0.5%) since 2017.

Domestic Tourism

2019 marked a big increase in domestic overnight tourism, becoming the **best year over the last decade in terms of visits and nights**, and second-best in terms of expenditure. The growth was driven by a significant rise in trips by **Scotland residents** which exceeded 2018 levels by a third. Visitors increased across most age groups, but mostly in the 55-64 and 16-24 ranges.

Overnight trips rose in each quarter of the calendar year, but unlike in 2018, mostly between **October and December** (+25%). Short holiday breaks and trips to visit friends or relatives increased the most in 2019.

International Tourism

The number of overseas inbound **trips declined by 7%** from 2018. Yet, associated spend grew by 7% which made 2019 **record-high in terms of international tourism expenditure**. USA remained Scotland's largest international market, with trips increasing by 11% year-on-year. After growing by a fifth in 2018, trips by European residents returned to their 2017 levels, making up just over half of all international travel to Scotland in 2019.

Holidaying was the most popular reason to visit Scotland in 2019, accounting for three in five overseas trips. Average **length of stay rose** to 7.9 nights due to decrease in short breaks and increase in longer stays. Only the last quarter of the calendar year saw growth in trips (+24%).

Introduction

Background Information and Aim

Overview

This report provides a summary of statistics on tourism in Scotland, including the overall volume and value of tourism and information on our major markets. It gathers data from a suite of tourism monitors managed by the Insight Department, VisitScotland, and from other national statistics and commissioned research.

These include:

- Great Britain Tourism Survey (GBTS), 2019
- International Passenger Survey (IPS), 2019
- Northern Ireland Statistical and Research Agency (NISRA), 2019
- Great Britain Day Visits Survey (GBDVS), 2019
- Scottish Accommodation Occupancy Survey (SAOS), 2019
- Moffat Centre's Scottish Visitor Attraction Monitor (VAM), 2019
- Scottish Annual Business Statistics (SABS), 2018

Statistics

This report presents statistical insight on domestic and international tourism trends in Scotland. Prior to 2011, the focus of the statutory tourism monitor for domestic overnight tourism was recording the resident population of the United Kingdom to destinations within the UK and the Republic of Ireland. Since 2011, the scope changed to only cover the resident population of Great Britain (Scotland, England and Wales) and trips within these jurisdictions. Northern Ireland data is now collected in a separate survey by NISRA. 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.

In this publication, percentage figures may not add up to 100% due to rounding. As with all surveys, data at sub-levels are based on smaller sample sizes and therefore incur a larger margin of statistical error which reduces data reliability. To address this issue, methods to aggregate data, such as using 3-year average instead of single-year figures, have been used in certain cases across the publication. Percentage points (pp) have been used to compare changes in accommodation occupancy rates (e.g. 41% in 2019, up 7pp from 34% in 2018).

Discover More

Further details, and the latest statistics for the year to date can be found on our website at visitscotland.org/research-insights and its subpages, namely:

- [About Our Visitors](#) – UK and international visitors, interests, activities, visitor surveys
- [About Our Industry](#) – accommodation, industry barometer, tourism employment
- [Regions](#) – dedicated papers on tourism performance across the Scottish regions
- [Trends](#) – research on the changing tourism sector and some of its recent trends

I. Tourism in Scotland

Latest Figures

North Berwick Beach, East Lothian
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Overall Tourism Summary: Visits, Nights and Spend – Value and Percent Change, 2019

Country of Residence	Visits		Nights		Spend	
	000s	% Change 2018/19	000s	% Change 2018/19	£m	% Change 2018/19
Scotland	7,692	+33%	22,263	+38%	1,422	+37%
England	5,936	+3%	23,179	0%	1,712	+3%
Wales	183	-31%	971	-7%	66	+14%
Total GB Overnight Tourism	13,810	+17%	46,413	+15%	3,200	+16%
Northern Ireland Overnight	258	+17%	926	+13%	127	+26%
International Overnight	3,460	-7%	27,385	+8%	2,538	+7%
Total Overnight Tourism	17,528	+11%	74,724	+12%	5,865	+12%
Total Day Tourism	133,600*	-3%	N/A	N/A	5,777	+6%
Grand Total	151,128	-2%	74,724	+12%	11,642	+9%

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

*Figure is rounded up to the nearest 100.

Overnight Visitors to Scotland

General Overview and Average Visitor

2019 was a very strong year for overnight tourism in Scotland. At 17.5 million and £5.9 billion, respectively, **overnight trips and spend were at their highest over the last decade**. This growth was largely driven by a big increase in domestic overnight tourism, in particular trips undertaken by **Scotland residents** which rose by a third from 2018. While Scottish travellers accounted for 37% of all overnight visits and 20% of all overnight spend in Scotland in 2018, these shares increased to 44% and 24%, respectively, in 2019.

Overseas visitors also played a significant part in the growth of total expenditure. Despite making 7% less trips to Scotland in 2019, they spent £160 million more in total (+7%) due to staying one more night and spending £96 more per trip, on average, compared to 2018.

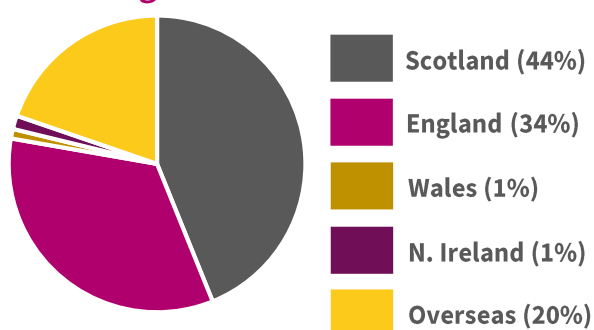
Overnight Visitors – Average Length of Stay, Trip and Daily Spend, 2019

Country of Residence	Length of Stay		Spend per Trip		Spend per Day	
	Nights	% Change 2018/19	£	% Change 2018/19	£	% Change 2018/19
Scotland	2.9	+4%	185	+3%	64	0%
England	3.9	-3%	288	-1%	74	+3%
Wales	5.3	+35%	361	+64%	68	+21%
Total Great Britain	3.4	-2%	232	-1%	69	+1%
Northern Ireland	3.6	-3%	492	+8%	137	+12%
Total International	7.9	+16%	734	+15%	93	0%
Total	4.3	+1%	335	+1%	78	0%

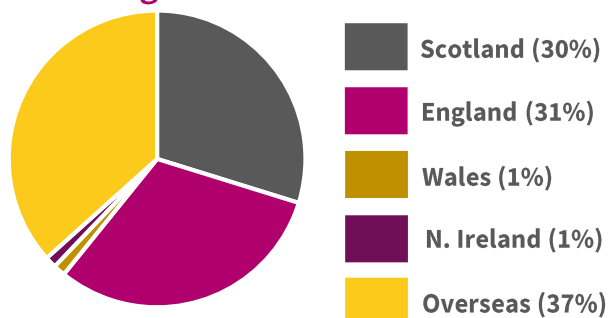
Sources: GBTS/NISRA/IPS, 2019.

Figures may not sum up due to rounding.

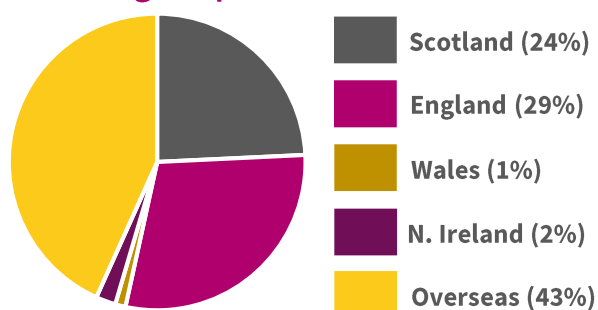
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/NISRA/IPS, 2019.

Figures may not sum up due to rounding.

Regional Context | UK, GB & Scotland

International and Domestic Figures

Overseas Visitors to the UK and Scotland and Domestic Visitors to GB and Scotland, 2019

Indicator	Overseas Visitors		Domestic Visitors	
	UK	Scotland	GB	Scotland
Total Visits	40.86 m	3.46 m	122.78 m	13.81 m
Total Nights	289.63 m	27.39 m	371.81 m	46.41 m
Total Spend	£28.30 bn	£2.54 bn	£24.65 bn	£3.20 bn
Average Length of Stay	7.09 nights	7.91 nights	3.03 nights	3.36 nights
Average Spend per Day	£98	£93	£66	£69
Average Spend per Visit	£693	£734	£201	£232

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

In 2019, **international trips to the UK grew** by over half a million, or a percent, from 2018. This led to a nearly £2 billion increase in overseas expenditure (+7%), despite a 1.7 million decrease in total nights spent (-1%). Compared to 2018, Scotland was a **less popular destination** for international travellers, with trips dropping by a quarter of a million (-7%) in 2019. Yet, the longer average length of stay of overseas visitors to Scotland led to increases in nights (2m more, or +8%) and spend (£160m more, or +7%). 2019 was the **best year** over the last decade in terms of **international tourist expenditure** for both **Scotland** and **the UK** as a whole.

Domestic tourism in **Great Britain** also grew, with overnight **trips and spend increasing** by 4.2m (+4%) and £690m (+3%), respectively, from 2018. Number of nights remained unchanged at 371m. Data indicates a much **stronger rise** in domestic tourism in **Scotland**, where trips, nights and expenditure all increased by roughly **a sixth** from their 2018 levels. In this wider regional context, trips to Scotland were characterised by both higher average spend and longer average stay.



Businesses, Employment & GVA

Sustainable Tourism in Scotland | 2018*

Business Units, Employment and Gross Value Added (GVA), 2018

Type	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Hotels and similar accommodation	2,050	+1%	47.2	-7%	1,384.8	0%
Holiday and other short-stay accommodation	894	+9%	3.3	-6%	119.8	+5%
Camping grounds, recreational vehicle parks and trailer parks	312	+2%	2.5	0%	76.6	-11%
Restaurants and mobile food service activities	8,925	+4%	92.3	+15%	1,498.2	0%
Beverage-serving activities	3,419	-1%	34.9	-4%	616.8	-3%
Tour operator activities	184	+6%	2.1	+11%	120.1	+56%
Other reservation service and related activities	191	+3%	2.1	+75%	54.8	+23%
Museum activities**	160	N/A	3.5	N/A	-3.4	N/A
Operation of historical sites and buildings and similar visitor attractions**	220	N/A	4.0	N/A	9.6	N/A
Botanical and zoological gardens and nature reserve activities	101	+5%	2.1	+5%	16.6	+41%
Operation of sports facilities	763	+11%	11.9	-10%	134.3	+4%
Other sports activities (not including activities of racehorse owners)	453	+5%	4.1	-9%	39.8	+3%
Activities of amusement parks and theme parks	25	+4%	0.9	+50%	12.0	-7%
Other amusement and recreation activities	398	+4%	6.3	+117%	61.2	-8%
Total sustainable tourism	18,095	+3%	217.1	+5%	4,141.2	+<1%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit: www.visitscotland.org.

** 2018 data not comparable to 2017 due to a partial reclassification of “museum activities” as “operation of historical sites and buildings and similar visitor attractions”.

According to the latest available statistics, the sustainable tourism sector continued to grow in **2018**. The number of tourism-related businesses increased by **534** (+3%), while employment levels rose by **10,500** (+5%). Productivity improvements measured by GVA increased to a lesser extent, by **£21m** (0.5%).

The number of business units grew across all subsectors except ‘Beverage-serving activities’ (1% decrease). Productivity improvements varied more significantly. They were most notable in ‘Tour operator activities’, ‘Other reservation service and related activities’ and ‘Botanical and zoological gardens and nature reserve activities.’ In absolute terms, the biggest employment increase was observed in ‘**Restaurants and mobile food service activities**’. Employment in **amusement and recreation activities** doubled from the previous year.

*The Scottish Government defines sustainable tourism as a growth sector including the business types listed in the table. Latest statistics were published on 24th June 2020 and cover the period up to 2018. New 2019 and revised 2018 figures are scheduled for release in June 2021.

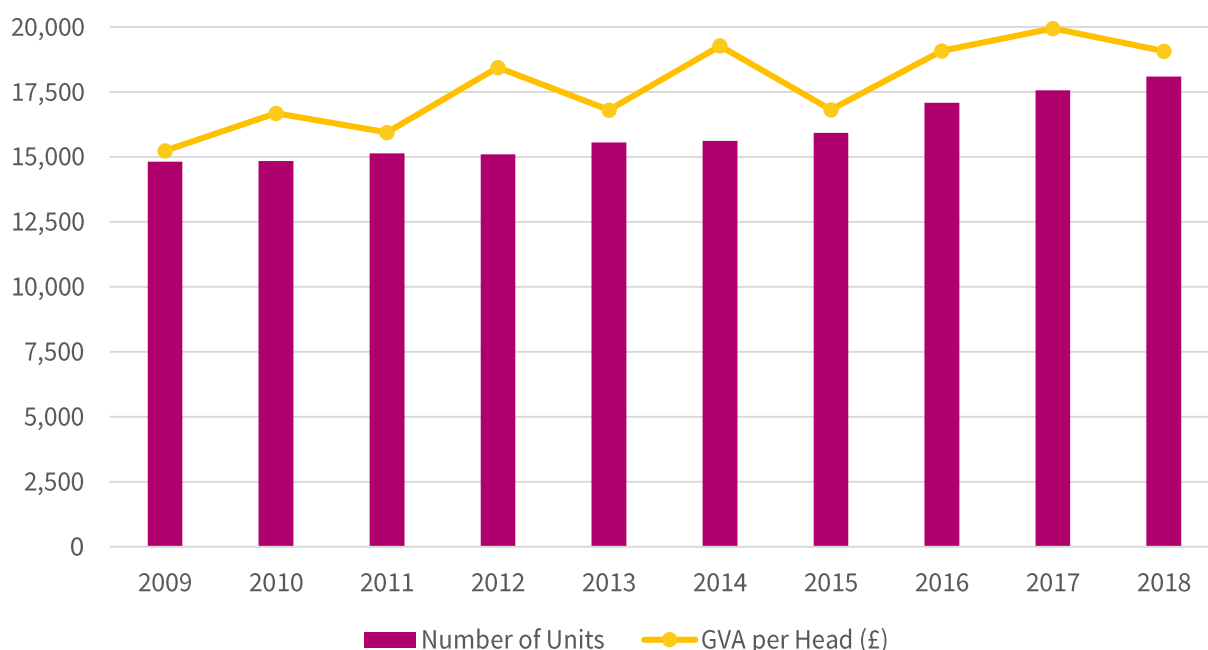
Sustainable Tourism Growth

Historical Trend Information | 2009 - 2018

Since 2009, there has been a steady increase in the number of sustainable tourism businesses and GVA contributions. **2018** became the **best year over the last analysed decade** in terms of business numbers, employment and total GVA. After increasing for two consecutive years, sustainable tourism GVA per head declined by 4% from 2017, as rise in employment exceeded GVA growth in 2018. Sustainable tourism GVA per head remains significantly below the national average of £52,549*; however, it increased by **21.4%** from 2009-2011 to 2016-2018, while the national average GVA per head grew by a modest **2.3%** over the same period. It should also be noted that GVA per head is based on the total number of employees (and not their full-time equivalent). High levels of part-time and seasonal jobs within the sustainable tourism sector therefore act to reduce the overall average GVA per head values in the tourism sector relative to other industries and the national average.

*Source: ONS, Annual Business Survey 2018. NB: GVA per head figure is based on a Scottish working population of 1,863,200 and excludes the public sector, financial sector and parts of agriculture.

Sustainable Tourism Business Units and GVA per Head Trend, 2009-2018



Source: SABS.

Number of Business Units, Employment, GVA and GVA per Head, 2009-2018

Indicator	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Number of Units	14,823	14,841	15,138	15,099	15,559	15,618	15,933	17,086	17,561	18,095
Employment (000s)	182	174	179	175	206	192	213	204	207	217
GVA (£m)	2,768	2,904	2,846	3,228	3,466	3,692	3,580	3,894	4,121	4,141
GVA per Head (£)	15,244	16,681	15,944	18,444	16,808	19,274	16,817	19,086	19,946	19,071

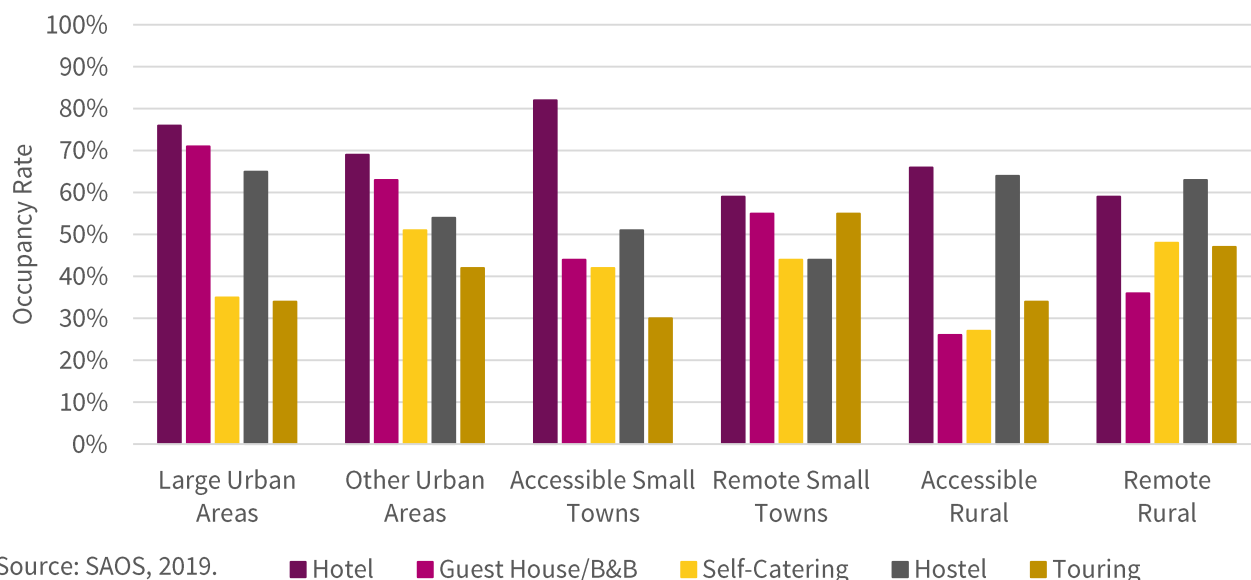
Source: SABS. Figures may not sum up due to rounding.

Accommodation Sector

Occupancy Rates

2019 was characterised by more significant changes in the overall occupancy rates of different accommodation types. While guest house/B&B room occupancy remained largely unchanged at 50% for a third year in a row and hotel room occupancy increased marginally by 1pp, **hostel bed** and **touring pitch** occupancy rates rose by **5pp** and **7pp**, respectively, on national level. These increases were largely driven by occupancy growth in **rural locations**. After a strong 2018, self-catering was the only accommodation type to experience a year-on-year decline in occupancy which fell by 7pp in 2019. Traditionally, **August** was the height of the season across the sector; only hostel occupancy peaked in July.

Occupancy Rates by Type of Accommodation and Location, 2019



Occupancy Rates by Type of Accommodation and Month, 2019

Month	Hotel (Room Occup.)	Guest House/B&B (Room Occup.)	Self-Catering (Unit Occup.)	Hostel (Bed Occup.)	Touring (Pitch Occup.)
January	48%	27%	32%	27%	17%
February	58%	29%	35%	41%	20%
March	63%	28%	37%	44%	21%
April	71%	47%	52%	59%	38%
May	81%	65%	56%	71%	54%
June	84%	62%	59%	71%	52%
July	83%	69%	64%	78%	55%
August	86%	80%	67%	75%	57%
September	82%	65%	54%	63%	46%
October	72%	41%	49%	51%	26%
November	61%	36%	33%	37%	21%
December	54%	31%	32%	33%	20%
Annual Average	71%	50%	48%	60%	41%

Source: SAOS, 2019. Figures represent average performance of participating Scottish businesses. To join the survey and benefit from business insights, contact the Moffat Centre at info@moffatcentre.com. Full annual report available at: <https://www.visitscotland.org/research-insights/about-our-industry/accommodation>.

Visitor Attractions

Popularity and Visitor Figures

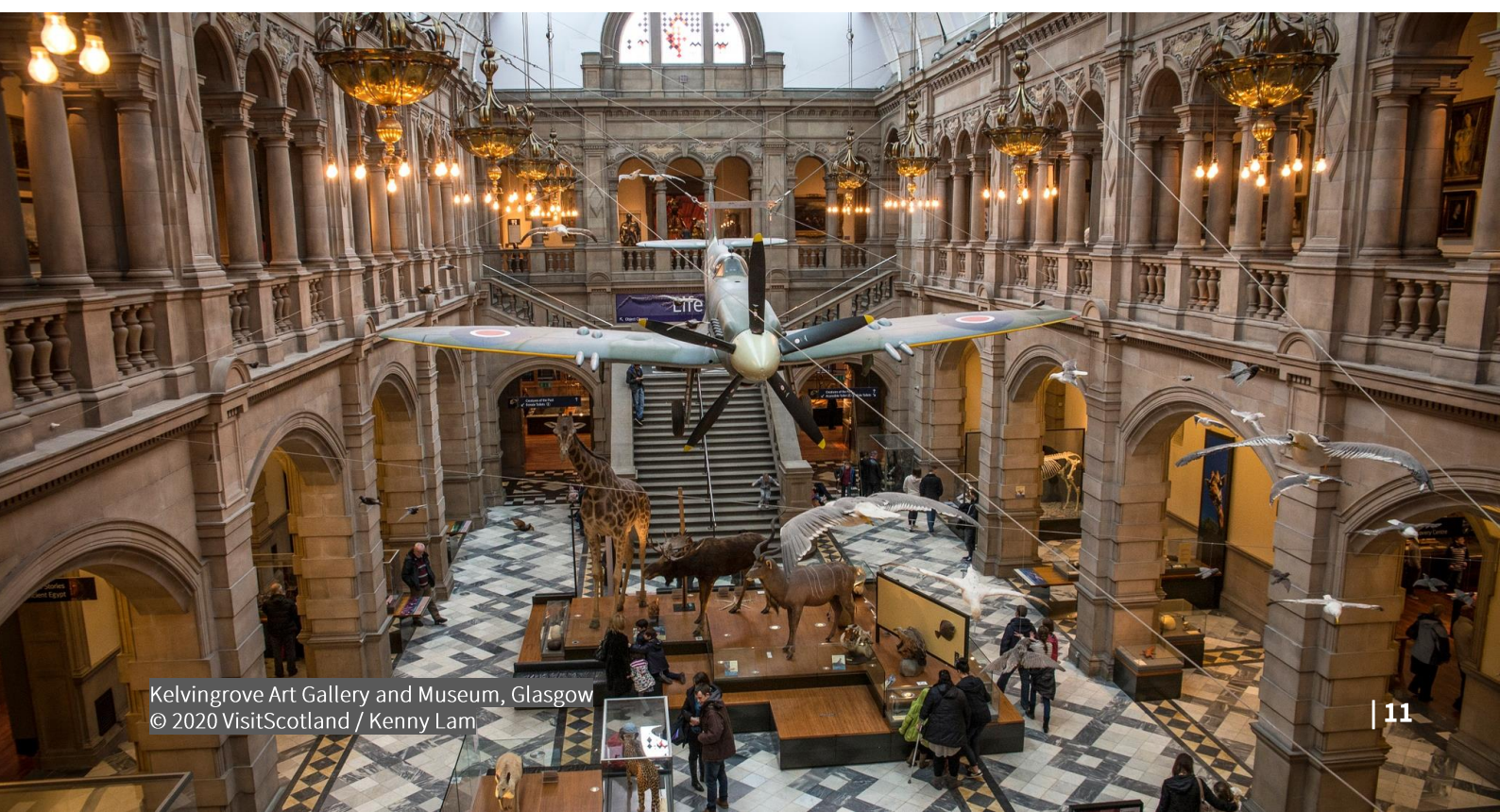
Most Popular Scottish Attractions – Visits and Percent Change, 2019

Top 10 Free Attractions	Visitors in 2019	% Change 2018/19
National Museum of Scotland	2,210,114	-1%
Kelvingrove Art Gallery & Museum	1,832,097	+74%
Scottish National Gallery	1,583,231	-9%
Riverside Museum	1,364,739	+9%
St Giles' Cathedral	1,217,991	-8%
Royal Botanic Garden Edinburgh	893,263	+8%
National War Museum	805,934	+1%
The Royal Scots Dragoon Guards Museum	800,607	+1%
Gretna Green Famous Blacksmiths Shop	772,448	0%
V&A Dundee	621,123	+82%

Top 10 Paid Attractions	Visitors in 2019	% Change 2018/19
Edinburgh Castle	2,167,366	+3%
Edinburgh Bus Tours	614,928	-13%
Stirling Castle	609,698	+1%
Urquhart Castle	547,518	+6%
Glenfinnan Monument	462,235	+22%
The Scotch Whisky Experience	385,733	0%
The Royal Yacht Britannia	357,271	-9%
Culzean Castle and Country Park	333,965	+5%
Loch Ness by Jacobite	321,980	+3%
Robert Burns Birthplace Museum	261,283	-4%

Source: Moffat Centre for Travel and Tourism Business Development, Scottish Visitor Attraction Monitor 2019.

The Scottish Visitor Attraction Monitor is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the survey or subscribing to the publication, please email info@moffatcentre.com.



II. Domestic Tourism Overnight Figures

Cullen Bay, Moray
© 2020 VisitScotland / North East 250 / Damian Shields

Domestic Overnight Tourism: Visits, Nights and Spend – Value and Percent of Total, 2019

Country	Visits		Spend		Nights	
	000s	%	£m	%	000s	%
Scotland	7,692	56%	1,422	44%	22,263	48%
England	5,936	43%	1,712	54%	23,179	50%
Wales	183	1%	66	2%	971	2%
Total GB Tourism	13,810	100%	3,200	100%	46,413	100%

Source: GBTS, 2019. Figures may not sum up due to rounding.

As in 2018, the growth of domestic tourism in 2019 was driven by **a rise in Scottish travellers** who undertook 1.9m more trips **(+33%)** compared to the previous year. Visits by English and Welsh residents increased much more marginally (+2%) and as a result residents of Scotland accounted for 56% of all domestic overnight trips, up from 49% in 2018 and 46% in 2017. While **nights and expenditure** of Scotland residents also **rose** by more than a third from 2018, English and Welsh visitors continue to provide over half of all domestic spend due to their longer length of stay.

Traditionally, nearly three-fifths of the total domestic tourism expenditure was in the form of **accommodation and travel expenses**. The overall increase in spend benefited most tourism-related sectors, ranging from accommodation and shopping to entertainment, food and drink. Package holidays and travel advice services saw a decline in domestic spend from 2018.

An increase in domestic visitors was observed in all seasons of the year but mostly between **October and December** (+25%). Trips to visit friends or relatives grew by nearly a quarter, and business trips by 12%. **Holidaying** remained the main reason to travel in Scotland in 2019 (56% of all visits), with trips lasting 4-7 nights increasing the most. Number of visits rose across all age groups in the range of **19% to 35%**, except for people aged 45-54 (-6%).

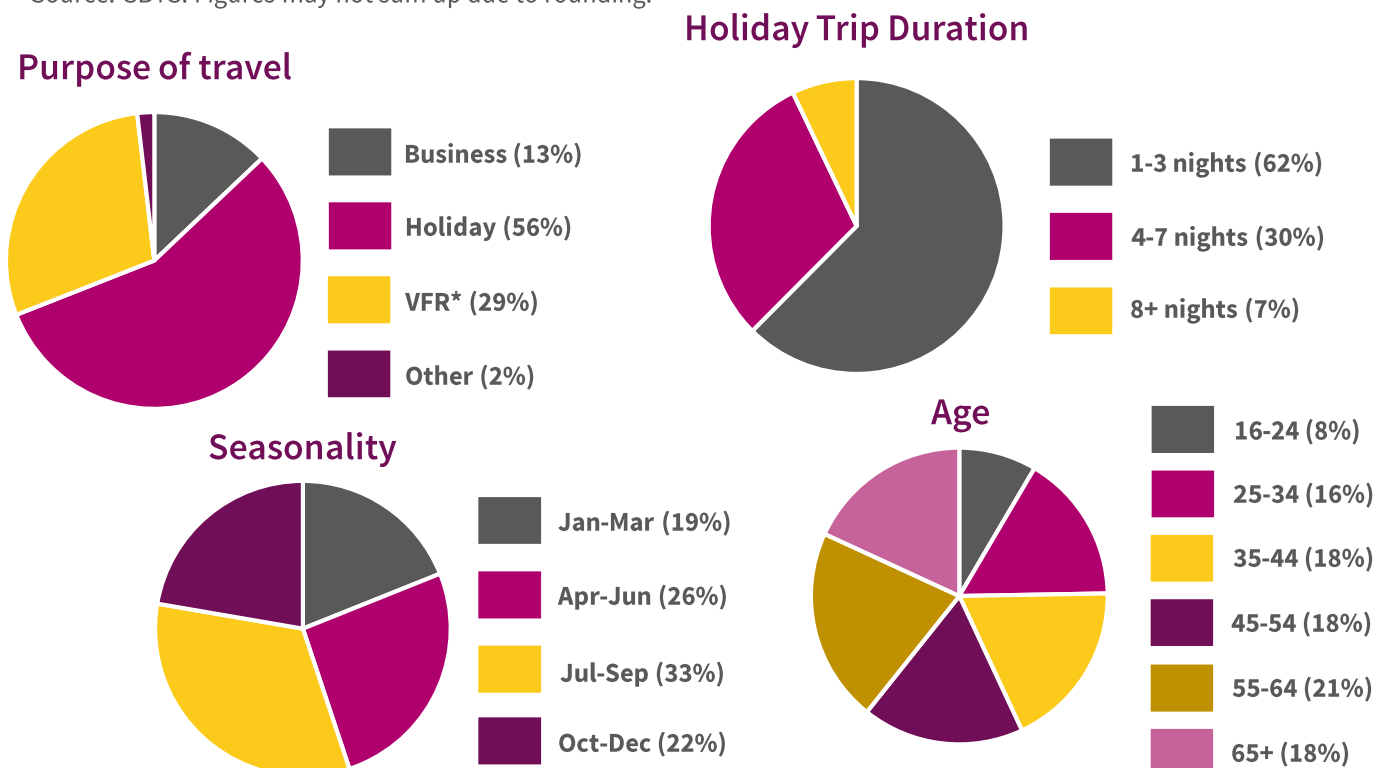
Overnight Visits Overview

Latest Information

Total Annual Spend per Sector and Activity, Domestic Overnight Visits Only, 2011-2019

Sector/Activity	2011 (£m)	2012 (£m)	2013 (£m)	2014 (£m)	2015 (£m)	2016 (£m)	2017 (£m)	2018 (£m)	2019		
									£m	% of Total	% Change 2018/19
Price of package holiday/inclusive trip	97	128	138	191	134	141	123	109	74	2%	-32%
Accommodation	931	895	954	978	1,064	1,061	1,045	979	1,170	37%	+20%
Travel costs to and from destination and during the trip	730	700	632	644	683	584	615	558	696	22%	+25%
Services or advice (e.g. travel guides, tourist information)	6	10	3	7	14	3	9	5	4	<1%	-20%
Buying clothes	166	161	171	131	133	144	118	101	113	4%	+12%
Eating and drinking out	596	537	546	576	664	525	628	582	664	21%	+14%
Other shopping	287	266	266	238	331	232	267	236	284	9%	+20%
Entertainment	146	145	135	155	170	175	145	145	170	5%	+17%
Anything else	59	48	44	45	84	32	56	46	24	1%	-48%
Total	3,018	2,891	2,889	2,871	3,279	2,897	3,006	2,762	3,200	100%	+16%

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



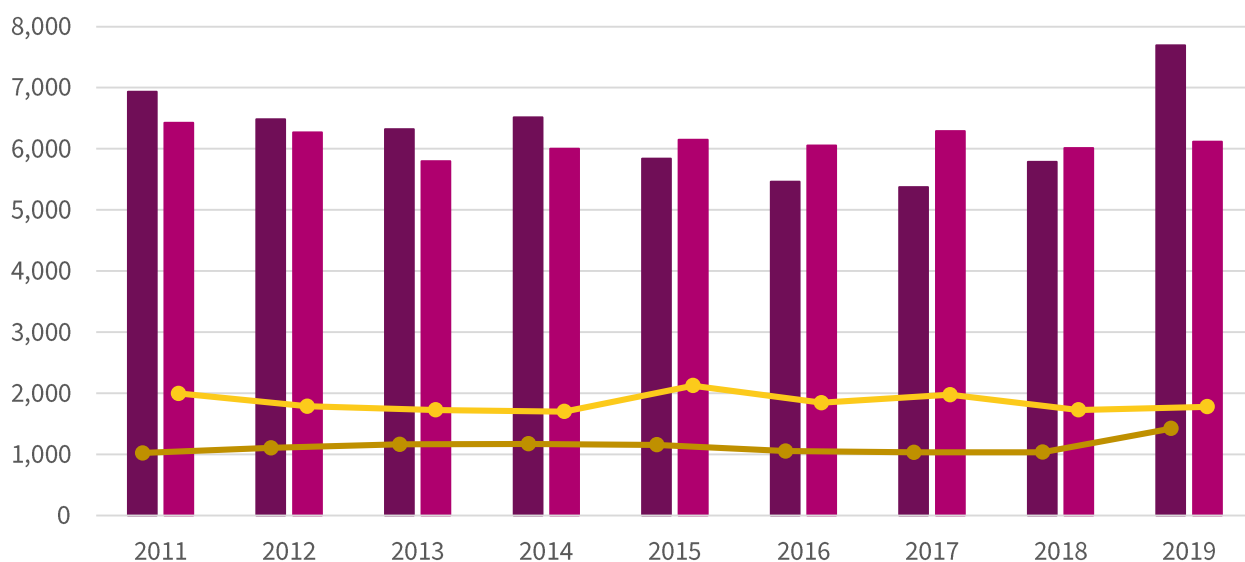
Source: GBTS, 2019. *VFR = Visiting friends or relatives.
Figures may not sum up due to rounding.

Historical Trend Information

Domestic Visitors to Scotland | 2011 - 2019

Following half a decade (2011-2016) of slow but steady decrease in the number of domestic overnight **trips** in Scotland, 2019 continued the **positive trend of growth** observed in 2017 and 2018. This led to corresponding increases in nights and spend which made 2019 the **best year over the last decade** in terms of domestic overnight visits and nights, and second-best for overnight tourism expenditure. The number of trips Scotland residents undertook in 2019 was **39%** above the average for 2016-2018. At 6.1m, visits by residents of England and Wales were identical to the average for the same period.

Domestic Overnight Tourism Volume and Value Trend, 2011-2019



Source: GBTS. ■ Scotland Trips (000s) ■ Rest of GB Trips (000s) ● Scotland (£m) ● Rest of GB (£m)

Domestic Overnight Visits, Nights & Spend by Country of Residence, 2016-2019*

Indicator	2016		2017		2018		2019	
	Scotland	Rest of GB	Scotland	Rest of GB	Scotland	Rest of GB	Scotland	Rest of GB
Total Visits (000s)	5,461	6,052	5,373	6,291	5,788	6,015	7,692	6,119
Total Nights (000s)	15,002	23,875	15,601	23,465	16,123	24,207	22,263	24,150
Total Spend (£m)	1,053	1,844	1,031	1,975	1,036	1,725	1,422	1,778
Average Length of Stay (Nights)	2.7	3.9	2.9	3.7	2.8	4.0	2.9	3.9
Average Spend per Day (£)	70	77	66	84	64	71	64	74
Average Spend per Visit (£)	193	305	192	314	179	287	185	291

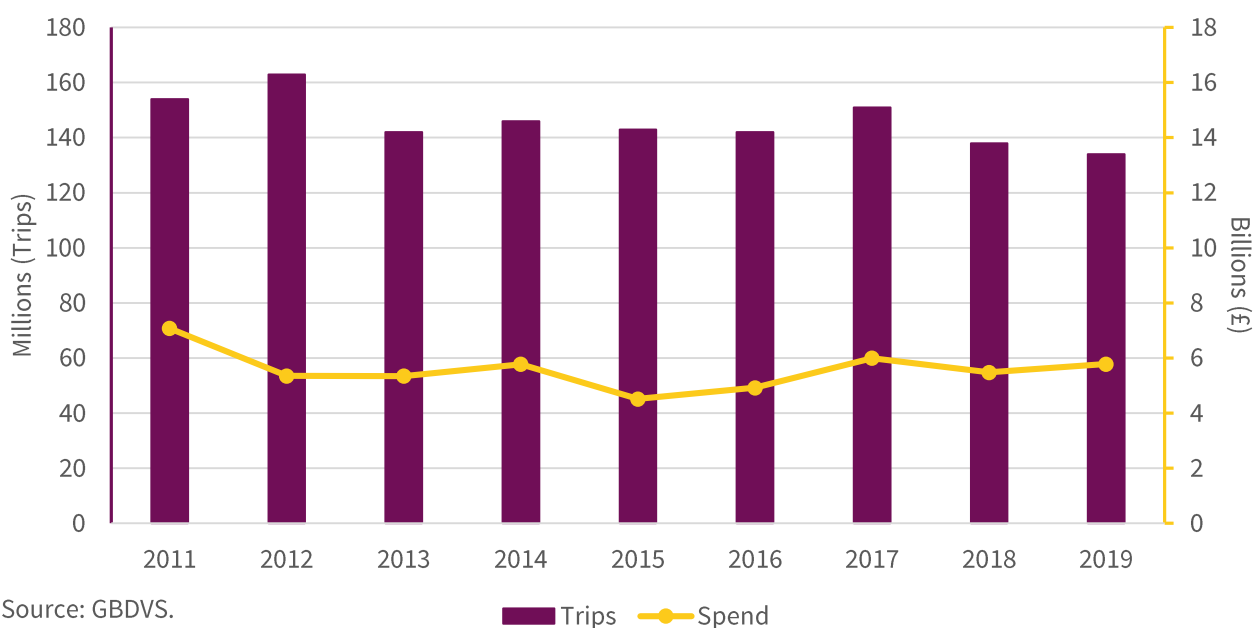
*Due to change in statistics methodology, comparisons between figures before and after 2015 should be treated with caution. The table contains only 2016-2019 figures which were obtained using the same methods. The chart above it aims to demonstrate overall tourism trends since 2011. Source: GBTS.

Day Visits Overview

Volume, Value and Popular Activities

In 2019, the number of **day trips** decreased for second year in a row to reach their **lowest** since 2011, 7% below the annual average for 2016-2018. Despite that, an **increase** in the average spend per trip to £43 resulted in a total **day trip expenditure** of £5.8 billion, 6% above the 2016-2018 average. Compared to 2018, day trippers took part in more leisure activities and visited friends or relatives more often. Going out for a meal, on a night out or to a visitor attraction decreased in popularity during domestic day trips in 2019.

Domestic Day Tourism Volume and Value Trend, 2011-2019



Most Popular Activities Undertaken as Part of a Day Trip, 2019

Activities	Trips 2019 (m)	% Change 2018/19
Visited friends or family for leisure	48.7	+8%
Went out for a meal	33.2	-11%
Undertook outdoor leisure activities such as walking, cycling, golf, etc.	29.9	+18%
Went on general days out/ to explore an area	23.8	-6%
'Special' shopping for items that you do not regularly buy	19.7	+12%
Went on a night out to a bar, pub and/or club	17.8	-5%
Went to visitor attractions such as a historic house, garden, theme park, museum, zoo, etc.	13.1	-4%
Went out for entertainment (to a cinema, concert or theatre)	12.7	-5%
Watched live sporting event (not on TV)	12.6	+13%
Took part in other leisure activities such as hobbies, evening classes, etc. (outside of home)	10.7	+20%

Source: GBDVS, 2019.

III. International Tourism

Top 10 Markets

The Northern Lights Viewed from Oban
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Scotland's Top 10 Markets for International Inbound Tourism: Trips, Nights and Spend – Value and Share of Total, 2019

Country	Visits		Spend		Nights	
	000s	%	£m	%	000s	%
USA	636	18%	717	28%	4,246	16%
Germany	322	9%	196	8%	2,228	8%
France	222	6%	135	5%	1,723	6%
Netherlands	182	5%	95	4%	1,210	4%
China*	172	5%	142	6%	2,047	7%
Australia	148	4%	146	6%	1,706	6%
Ireland	146	4%	60	2%	475	2%
Spain*	128	4%	51	2%	915	3%
Canada	125	4%	92	4%	1,023	4%
Italy*	122	4%	86	3%	1,072	4%
Rest of World	1,257	36%	818	32%	10,741	39%
Total	3,460	100%	2,538	100%	27,385	100%

Source: IPS, 2019. Figures may not sum up due to rounding. *Figures based on lower sample sizes.
For detailed information on each of these markets (and more), visit our dedicated International Visitors page at:
<https://www.visitscotland.org/research-insights/about-our-visitors/international>.

International Visits Overview

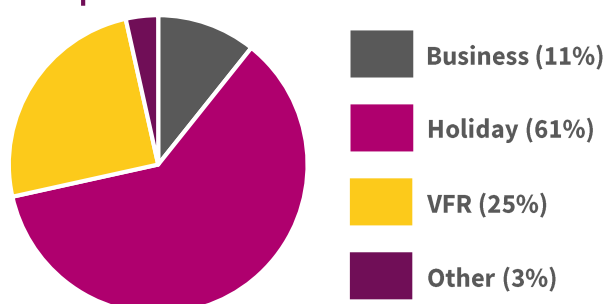
Latest Information

Reason for Visiting, Trip Duration, Seasonality and Age, 2019

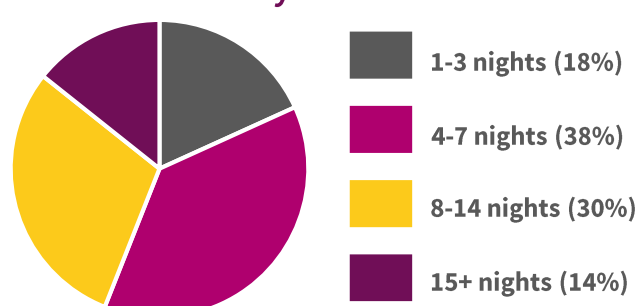
	Purpose of Travel				Duration of Stay (nights)					
	Business	Holiday	VFR	Other	1-3	4-7	8-14	15+		
2019 Visits (000s)	371	2,105	864	121	630	1,307	1,027	495		
% Change 2018/19	-23%	0%	-18%	+44%	-29%	-6%	+7%	+2%		
	Seasonality				Age					
	Q1	Q2	Q3	Q4	16-24	25-34	35-44	45-54	55-64	65+
2019 Visits (000s)	443	913	1,264	839	382	872	683	659	525	276
% Change 2018/19	-36%	-15%	-2%	+24%	-17%	+4%	-13%	-6%	-2%	-24%

Source: IPS, 2019.

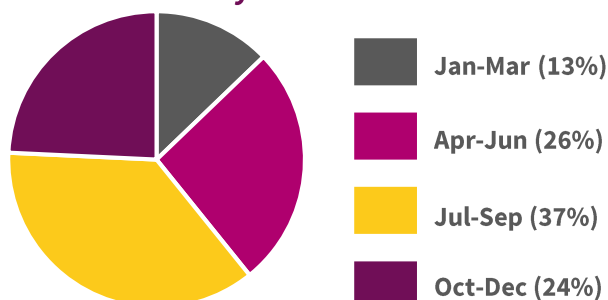
Purpose of travel



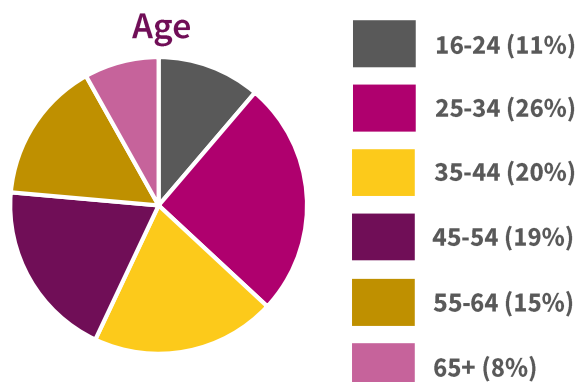
Duration of Stay



Seasonality



Age



Source: IPS, 2019.

Figures may not sum up due to rounding.

The overall decrease in international visits from the record-high 2018 was observed across most of Scotland's top ten markets, particularly Italy, Spain, France and Germany. **Trips from Europe** returned to their **2017 levels** after growing by 20% in 2018, and among the European markets in the top ten only Ireland and Netherlands marked increases in 2019. North American residents undertook 9% more trips to Scotland in 2019 which was driven by a **rise in US travellers**.

Going on a holiday continued to be the most popular reason to visit Scotland and the number of these trips remained unchanged at 2.1m, or three-fifths of all in 2019. Business and VFR trips both decreased from 2018, by 23% and 18%, respectively. The decline in overseas visits was caused by a **drop in short stays** (up to 3 nights) which appears consistent with the year-on-year changes in visitor mix and purpose of travel. Trips lasting more than a week increased to represent 44% of all in 2019. In terms of seasonality and visitors' age, number of trips rose only in the last quarter of the year (+24%) and across travellers aged 25 to 34 (+4%).

Regional and Seasonal Trends

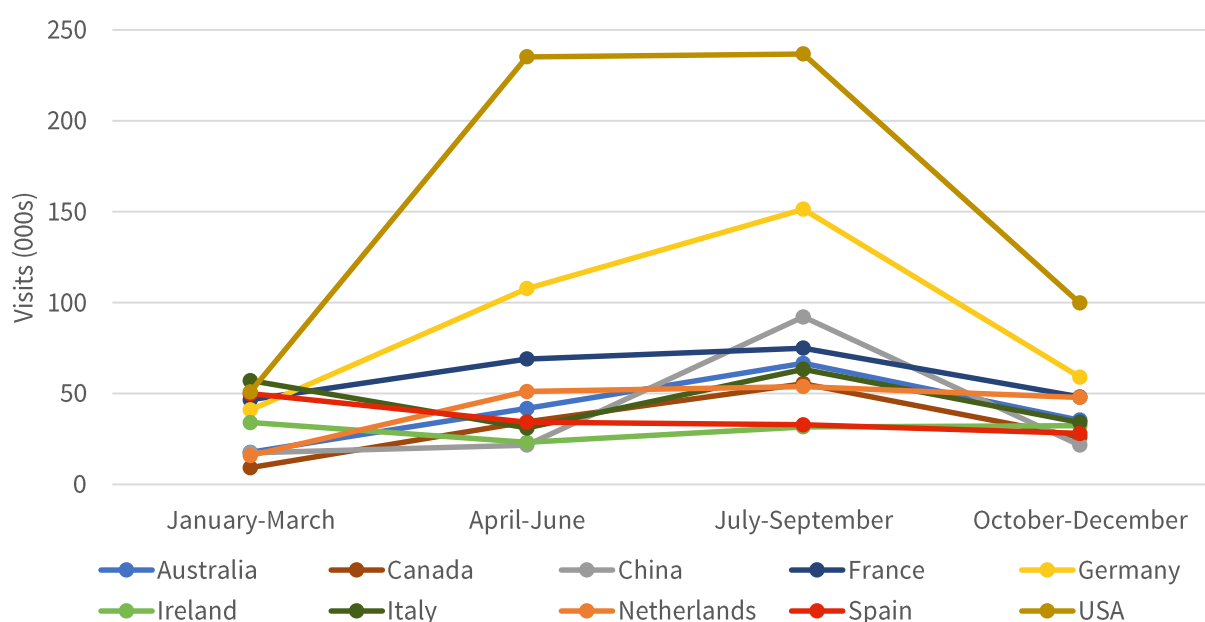
International Visitor Variability

Top Overseas Markets for Tourist Visits by Scottish Region, 2017-2019

Region	Top 5 Overseas Markets				
	1	2	3	4	5
Argyll & the Isles	USA	Germany	Netherlands	Australia	Italy*
Ayrshire & Arran	USA	Germany	Canada	Australia*	France*
Dumfries & Galloway	USA*	Australia*	Germany*	Netherlands*	Romania*
Dundee & Angus	USA*	Poland*	Germany*	France*	Australia*
Edinburgh & Lothians	USA	Germany	France	Italy	China
Fife	USA	Germany*	Canada*	Australia*	Spain*
Forth Valley	Germany	USA	Netherlands	Belgium*	Canada*
Grampian	USA	Norway	Germany	Netherlands	France
Gtr. Glasgow & Clyde Valley	USA	Germany	Australia	Canada	France
Highlands & Islands	USA	Germany	France	Netherlands	Canada
Perth & Kinross	USA	Germany	Netherlands	Australia*	France*
Scottish Borders	Netherlands	Germany*	Switzerland*	USA*	France*

Source: IPS. The table is based on 3-year average data (2017-2019). *Low sample size. For more detailed information on regional level, please visit <https://www.visitscotland.org/research-insights/regions>.

Seasonality of Scotland's Top 10 Overseas Tourism Markets, 2017-2019



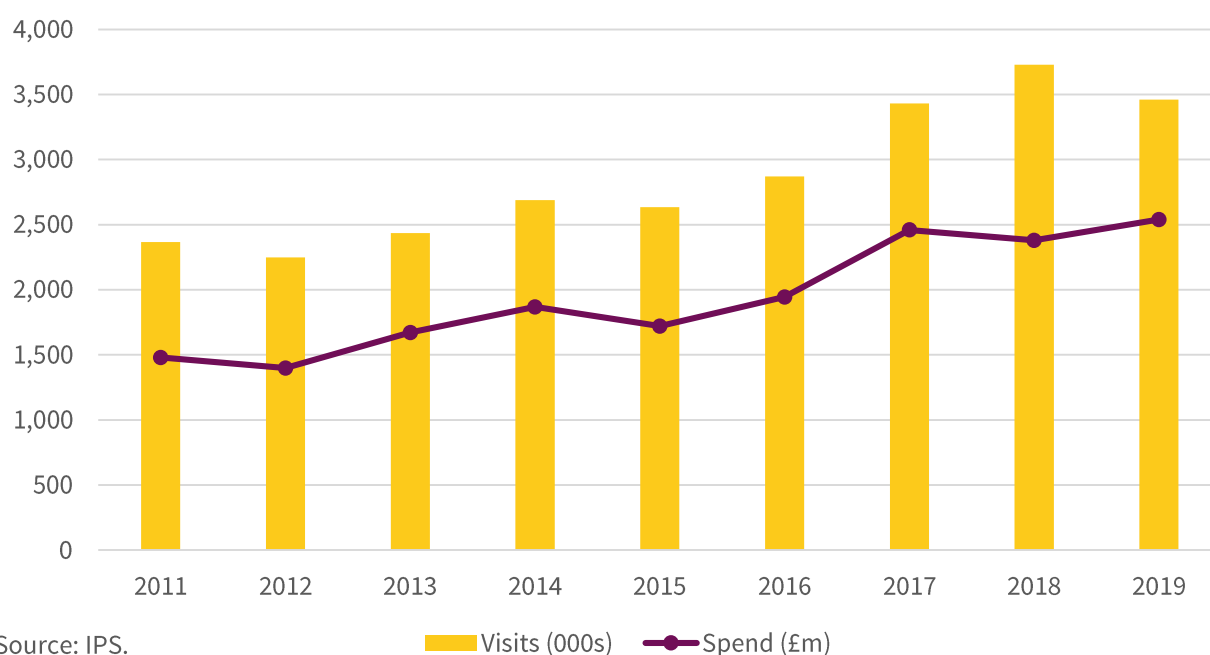
Source: IPS. Figure based on 3-year average data (2017-2019).

Historical Trend Information

International Visitors to Scotland | 2011 - 2019

2019 was the **second most successful year in the last decade** in terms of total **visits**, and the **best** in terms of total **nights** and **spend** by overseas visitors to Scotland. The trend of growth over the years is evident: international trips increased from 2.35m per year on average between 2011 and 2013 to 2.73m per year on average in 2014-2016 (+16%), and then again to 3.54m per year on average in 2017-2019 (+30%). Spend rose by £328m (+22%) and then by £615m (+33%) annually over the same periods. As average daily spend remained unchanged at £93 for third year in a row, the 2019 increase in total tourism expenditure was result of a **rise in the average length of stay**.

Inbound Tourism Volume and Value Trend, 2011-2019



Visits, Nights & Spend – Total Values and Average Traveller, 2011-2019

Indicator	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total Visits (000s)	2,367	2,249	2,436	2,690	2,635	2,871	3,432	3,729	3,460
Total Nights (000s)	17,704	17,645	19,441	21,940	21,443	22,483	26,451	25,443	27,385
Total Spend (£m)	1,478	1,398	1,671	1,868	1,720	1,944	2,459	2,379	2,538
Average Length of Stay (Nights)	7.5	7.8	8.0	8.2	8.1	7.8	7.7	6.8	7.9
Average Spend per Day (£)	84	79	86	85	80	86	93	93	93
Average Spend per Visit (£)	625	621	686	694	653	677	716	638	734

Source: 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), Northern Ireland Statistical and Research Agency (NISRA), 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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