## Tourism Visitor Volume and Value to Scotland

### Domestic Overnight Tourism
- **Quarter 1**
  - Trips (Millions): 2016 - 2.48, 2017 - 1.78, 2018 - 2.54, % Change 2018/17: +42.7%, % Change 2018/16: +2.4%
  - Spend (£ Millions): 2016 - £582, 2017 - £397, 2018 - £575, % Change 2018/17: +44.7%, % Change 2018/16: -1.2%

- **Rolling 12 months**
  - Trips (Millions): 2016 - 12.00, 2017 - 10.81, 2018 - 12.42, % Change 2018/17: +14.9%, % Change 2018/16: +3.5%
  - Spend (£ Millions): 2016 - £3,264, 2017 - £2,715, 2018 - £3,185, % Change 2018/17: +17.3%, % Change 2018/16: -2.4%

### International Tourism
- **Quarter 1**
  - Spend (£ Millions): 2016 - £167, 2017 - £196, 2018 - £336, % Change 2018/17: +71.4%, % Change 2018/16: +100.8%

- **Rolling 12 month**
  - Trips (Thousands): 2016 - 2,681, 2017 - 2,763, 2018 - 3,419, % Change 2018/17: +23.7%, % Change 2018/16: +27.5%
  - Spend (£ Millions): 2016 - £1710, 2017 - £1878, 2018 - £2416, % Change 2018/17: +28.6%, % Change 2018/16: +41.3%

### Tourism Day Trips
- **Quarter 1**
  - Spend (£ Millions): 2016 - £1,220, 2017 - £1,267, 2018 - £1,232, % Change 2018/17: -2.8%, % Change 2018/16: +1.0%

- **Rolling 12 month**
  - Trips (Millions): 2016 - 149.1, 2017 - 142.0, 2018 - 148.0, % Change 2018/17: +4.2%, % Change 2018/16: -0.7%
### Combined International & Domestic Overnight Tourism to Scotland

<table>
<thead>
<tr>
<th></th>
<th>Trips (Thou)</th>
<th>Quarter 1</th>
<th>% Change</th>
<th>Rolling 12 Months</th>
<th>% Change</th>
<th>4Q to</th>
<th>4Q to</th>
<th>4Q to</th>
<th>4Q18/</th>
<th>4Q18/</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2016</td>
<td>2017</td>
<td>2018</td>
<td>18/17</td>
<td>18/16</td>
<td>16Q1</td>
<td>17Q1</td>
<td>18Q1</td>
<td>4Q17</td>
<td>4Q16</td>
</tr>
<tr>
<td>International</td>
<td>412</td>
<td>429</td>
<td>637</td>
<td>48.6%</td>
<td>54.7%</td>
<td>2,681</td>
<td>2,763</td>
<td>3,419</td>
<td>23.7%</td>
<td>27.5%</td>
</tr>
<tr>
<td>Domestic</td>
<td>2,484</td>
<td>1,780</td>
<td>2,542</td>
<td>42.7%</td>
<td>2.4%</td>
<td>12,001</td>
<td>10,810</td>
<td>12,420</td>
<td>14.9%</td>
<td>3.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,896.0</strong></td>
<td><strong>2,208.7</strong></td>
<td><strong>3,179.0</strong></td>
<td><strong>43.9%</strong></td>
<td><strong>9.7%</strong></td>
<td><strong>14,681.8</strong></td>
<td><strong>13,573.4</strong></td>
<td><strong>15,839</strong></td>
<td><strong>16.7%</strong></td>
<td><strong>7.9%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Spend (£m)</th>
<th>Quarter 1</th>
<th>% Change</th>
<th>Rolling 12 Months</th>
<th>% Change</th>
<th>4Q to</th>
<th>4Q to</th>
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<td>16Q1</td>
<td>17Q1</td>
<td>18Q1</td>
<td>4Q17</td>
<td>4Q16</td>
</tr>
<tr>
<td>International</td>
<td>£167</td>
<td>£196</td>
<td>£336</td>
<td>71.4%</td>
<td>100.8%</td>
<td>£1,710</td>
<td>£1,878</td>
<td>£2,416</td>
<td>28.6%</td>
<td>41.3%</td>
</tr>
<tr>
<td>Domestic</td>
<td>£582</td>
<td>£397</td>
<td>£575</td>
<td>44.7%</td>
<td>-1.2%</td>
<td>£3,264</td>
<td>£2,715</td>
<td>£3,185</td>
<td>17.3%</td>
<td>-2.4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£749.1</strong></td>
<td><strong>£592.7</strong></td>
<td><strong>£911</strong></td>
<td><strong>53.7%</strong></td>
<td><strong>21.6%</strong></td>
<td><strong>£4973.8</strong></td>
<td><strong>£4593.4</strong></td>
<td><strong>£5601</strong></td>
<td><strong>21.9%</strong></td>
<td><strong>12.6%</strong></td>
</tr>
</tbody>
</table>

### Interpretation of Tourism Performance

For the first quarter of 2018, there were 3.2 million trips and £911 million spend by international inbound and GB residents taking overnight visits to Scotland. By contrast UK residents took 13.3 million visits abroad in the first quarter of 2018, -6% less than the same period in 2017, spending £8.6 billion (in nominal terms), down -1.2% on the same period. It should be noted that this represents a third quarter decline in UK resident outbound trips, with Q3 and Q4 2017 recording a drop in trips abroad and a second quarter drop in expenditure. Day Visits declined in the first quarter of the year, possibly in relation to the weather and the influence outdoor activity has on this purpose of trip.

Weather was a factor over January to March from Storm Eleanor in January to the “Beast from the East” snows of late February into March which disrupted travel. There was however periods of dry cold weather combined with the Hogmanay and Easter Holidays (Good Friday, 30th March in 2018) in January and March which provided opportunity for visitors to take breaks within Scotland.

In Quarter 1 all main international market regions recorded growth. European markets provided the majority of the increase in visitors with North America and Rest of World also showing double digit expansion on 2017/Q1. Domestic overnight tourism also showed growth across all purposes of trip. Holidays, Visiting Friends and Relatives and Business Travel all increased in Q1/2018 compared to Q1/2017.

### Sources:
- Great Britain Tourism Survey (GBTS)
  Note: Domestic Visitors are residents of Great Britain staying overnight in Scotland.
- International Passenger Survey (IPS)
- 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
Rolling 12 months – April to March inclusive

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March 2019 Version 2.0