

FLY FISHING  
PERTSHIRE

A fly fisherman in waders is standing in a river, casting a fly line. The line is captured in mid-air, forming a large loop. The background shows a rocky bank with trees and a forest.

**INSIGHT DEPARTMENT  
SCOTLAND'S TOURISM PERFORMANCE  
QUARTER 2 / 2018**

11<sup>th</sup> October 2018

 Visit Scotland | Alba™

# TOURISM STATISTICS Q2/2018

## Tourism Visitor Volume and Value to Scotland

Domestic Overnight Tourism <sup>a</sup> Quarter 2	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	3.072	2.974	2.511	-15.6%	-18.3%
Spend (£ Millions)	£773	£742	£655	-11.7%	-10.6%

Domestic Overnight Tourism <sup>a</sup> Half Year	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	5.623	4.754	4.666	-1.9%	-17.0%
Spend (£ Millions)	£1355	£1139	£1158	+1.7%	-14.5%

International Tourism <sup>b</sup> Quarter 2	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	0.720	0.877	1.055	+20.3%	+46.5%
Spend (£ Millions)	£540	£770	£632	-17.9%	+17.0%

International Tourism <sup>b</sup> Half Year	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	1.132	1.306	1.692	+29.6%	+49.4%
Spend (£ Millions)	£708	£966	£967	+0.1%	+36.6%

Tourism Day Trips <sup>c</sup> Quarter 2	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	32.9	39.0	34.4	-11.8%	+4.6%
Spend (£ Millions)	£863	£1828	£1401	-23.4%	+62.3%

Tourism Day Trips <sup>c</sup> Half Year	2016	2017	2018	% Change 2018/17	% Change 2018/16
Trips (Millions)	66.4	72.6	64.8	-10.7%	-2.4%
Spend (£ Millions)	£2083	£3095	£2633	-14.9%	+26.4%



# TOURISM STATISTICS Q2/2018

## Combined International & Domestic Overnight Tourism to Scotland

Trips (Million)	Quarter 2			% Change		Half Year (Jan-Jun)			% Change	
	2016	2017	2018	18/17	18/16	H1/16	H1/17	H1/18	H1/18-H1/17	H1/18-H1/16
International	0.72	0.877	1.055	20.3%	46.5%	1.132	1.306	1.692	29.6%	49.5%
Domestic	3.072	2.974	2.511	-15.6%	-18.3%	5.623	4.754	4.666	-1.9%	-17.0%
<b>Total</b>	<b>3.792</b>	<b>3.851</b>	<b>3.566</b>	<b>-7.4%</b>	<b>-6.0%</b>	<b>6.755</b>	<b>6.060</b>	<b>6.358</b>	<b>4.9%</b>	<b>-5.9%</b>

  

Spend (£m)	Quarter 2			% Change		Half Year (Jan-Jun)			% Change	
	2016	2017	2018	18/17	18/16	H1/16	H1/17	H1/18	H1/18-H1/17	H1/18-H1/16
International	£540	£770	£632	-17.9%	17.0%	£708	£966	£967	0.1%	36.6%
Domestic	£773	£742	£655	-11.7%	-15.3%	£1,355	£1,139	£1,158	1.7%	-14.5%
<b>Total</b>	<b>£1313</b>	<b>£1512</b>	<b>£1287</b>	<b>-14.9%</b>	<b>-2.0%</b>	<b>£2063</b>	<b>£2105</b>	<b>£2125</b>	<b>1.0%</b>	<b>3.0%</b>

## Interpretation of Tourism Performance

For the first half of 2018, there were 6.4 million trips and £2.1 billion spend by International inbound and GB residents taking overnight visits to Scotland. By contrast UK residents took 33.2 million visits abroad in the first half of 2018, -2.3% less than the same period in 2017, spending £20.2 billion (in nominal terms), down -0.2%. It should be noted that this represents a fourth quarter decline in UK resident outbound trips, with Q3 and Q4/2017 and Q1/2018 recording a drop in trips abroad and a third (albeit marginal) quarter drop in expenditure. Day Visits declined in the second quarter of the year, although up on Q2/2016, possibly in relation to timing of Easter in 2018 and strong performance in 2017. At a GB level for the first half of the year, domestic overnight trips increased +4.2% to 55.3 million while international inbound trips to GB decreased -6.8% to 17.9 million. Expenditure by GB overnight residents in GB increased +5.4% to £10.7 billion and international inbound spend to GB declined -5.2% to £10.3 billion.

Exchange Rates were still favourable for inbound markets to Scotland. This combined with continued benefits from established airline connectivity, the improving weather towards the end of quarter two and a developed events program across the whole of the country.

In Quarter 2, European markets provided the majority of the increase in visitors. North America recorded a decline. It should be noted however that the Q2/2018 North America performance was up on the same period in 2014 to 2016. Domestic overnight tourism trips by purpose for H1/2018 against H1/2017 saw Holidays and Visiting Friends & Relatives down -6.9% and -1.4% respectively. Business Travel trips increased in the same period by +24.9%.

### 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

Half Year = January to June

### Disclaimer:

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### Contact Us

Insight Department  
VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh  
EH6 6JH  
T: 0131 472 2222  
research@visitscotland.com  
www.visitscotland.org

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