

SHETLAND PONY,
HAROLDSWICK, UNST, SHETLAND

**INSIGHT DEPARTMENT
SCOTLAND'S TOURISM PERFORMANCE
QUARTER 1 / 2019**

25th July 2019

Scottish Tourism Industry – Q1 at a Glance

Visitors

Total Visitor Spend
£1,812m ▼ -15.5%

Day Visitor Spend
£1,095m ▼ -11.1%

Domestic Overnight Spend ^a
£524m ▼ -8.9%

International Inbound Spend ^b
£193m ▼ -42.6%

Total Overnight Spend ^{a+b}
£717m ▼ -%

Total Visitor Trips
32.4m ▼ -3.7%

Day Visitor Trips
29.4m ▼ -3.6%

Domestic Overnight Trips ¹
2.6m ▲ +2.9%

International Inbound Trips ²
0.42m ▼ -35.1%

Total Overnight Trips ¹⁺²
3.03m ▼ -4.8%

Accommodation Occupancy

Hotel (Room)
56% ▼ -0.5 percentage points

Guest House / B&B (Room)
27% ▲ +6 percentage points

Self Catering (Unit)
35% ▼ -4 percentage points

Hostel (Bed)
37% ▼ -2 percentage points

Touring Caravan & Camping (Pitch)
19% ▲ +5% percentage points

Average Length of Stay (nights)

Domestic Overnight 2.72

Spend Per Trip

Domestic Overnight £200

Spend Per Night

Domestic Overnight £74

TOURISM STATISTICS 2019

Tourism Visitor Volume and Value to Scotland Q1

	Q1 2018	Q1 2019	%Ch 2019-18	3 Year AAGR
Overall Total				
Trips (m)	33.68	32.43	-3.71%	-4.67%
Nights (m)	-	-	-	-
Spend (£m)	2143.00	1812.00	-15.45%	0.80%
Total Overnight				
Trips (m)	3.18	3.03	-4.75%	20.19%
Nights (m)	-	-	-	-
Spend (£m)	911.00	717.00	-21.30%	20.11%
Domestic Overnight				
Trips (m)	2.54	2.62	2.87%	22.84%
Nights (m)	7.48	7.11	-4.97%	20.37%
Spend (£m)	575.00	524.00	-8.87%	17.98%
Scots Residents				
Trips (m)	1.25	1.50	19.87%	31.37%
Nights (m)	2.98	3.67	23.16%	34.67%
Spend (£m)	231.50	251.30	8.55%	24.43%
RoUK Residents				
Trips (m)	1.29	1.11	-13.65%	14.55%
Nights (m)	4.50	3.44	-23.59%	10.91%
Spend (£m)	343.50	272.70	-20.61%	13.72%
International Inbound				
Trips (m)	0.64	0.42	-35.05%	10.02%
Nights (m)	-	-	-	-
Spend (£m)	336.00	193.00	-42.56%	29.32%
North America				
Trips (m)	0.05	0.06	17.98%	42.06%
Nights (m)	-	-	-	-
Spend (£m)	34.00	43.00	26.47%	19.90%
Europe				
Trips (m)	0.49	0.27	-45.49%	8.59%
Nights (m)	-	-	-	-
Spend (£m)	232.00	95.00	-59.05%	27.88%
Rest of World				
Trips (m)	0.10	0.09	-10.83%	6.27%
Nights (m)	-	-	-	-
Spend (£m)	70.00	55.00	-21.43%	59.98%
Tourism Day Trips				
Trips (m)	30.50	29.40	-3.61%	-6.28%
Spend (£m)	1232.00	1095.00	-11.12%	-6.94%

TOURISM STATISTICS 2019

Rolling 12 Month Figures

	Volume (000s)		Value (£m)	
	Q2 2018- Q1 2019	Change	Q2 2018- Q1 2019	Change
North America	632	-8%	564	-13%
Europe	2,027	-3%	974	-22%
- of which EU	1,814	-1%	874	-18%
- of which EU15	1,638	1%	823	-19%
- of which Other EU	176	-14%	51	2%
Other Countries	655	0%	525	2%
Total World	3,314	-3%	2,063	-15%

Interpretation of Tourism Performance During Q1/2019

Overnight tourism visits (domestic + international) to Scotland declined by -5% in the first quarter of the year with an accompanying -21% decline in spend relative to Q1/2018.

Domestic overnight tourism in Scotland during Q1/2019 recorded a +2% increase in trips driven by strong growth in the Scottish residential market, however spend dropped by -9%, again relative to Q1/2018.

International inbound visits to Scotland were down -35% to 415,000 visits following a record 2018 period with spend down -43% to £193 million. Although 2019 figures fell relative to Q1/2018, performance is in line with figures seen prior to the Q1 2018 which was a record in terms of tourism performance.

Q1/2019 performance is closer to levels seen in Q1/2017 rather than the strong record levels of Q1/2018. This is in part due to Easter falling on 21st April this year and 1st April 2018 producing a possible displacement effect. Additionally the weather and geopolitical situations in March may have influenced visitor behavior also? The figures also reflect the volatility of survey measurement during this relatively quieter season, with smaller sample populations having an amplified statistical effect.

Sources:

Domestic Overnight = Great Britain Tourism Survey (GBTS)

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

International Inbound = International Passenger Survey (IPS)

Day Visits = Great Britain Day Visit Survey (GBDVS)

Accommodation Occupancy = Scottish Accommodation Occupancy Survey (SAOS)

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

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