Executive Summary
Key Facts and Trends

This factsheet provides the latest data on the volume and value of visitors from the International Passenger Survey (IPS), as well as recent information on consumer trends and attitudes.

Australia continued to be one of Scotland’s top markets for international inbound tourism in 2018. Visits increased significantly, totalling 172,000 in 2018, up 10% from 2017. Nights marked an even higher increase of 19%, while total expenditure grew by £19m (+14%).

Most Australian visits occur from July to September and are predominately made by holiday-makers (53%), although visiting friends and relatives also makes up a large proportion (43%) of trips from our friends “down under”. Given the strong links between Australians and Scots its no wonder they are our 6th largest market in terms of visitors and 4th in terms of expenditure.

As Australians have to travel a long way to reach Scotland, it is not surprising that they stay for a long time (on average 10.5 nights) and visit a variety of different places, thus experiencing more of what Scotland has to offer. Australians also spend more money during their trip, reaching an average of £889 per visit, or 43% more than the average overseas visitor in 2018.

Australians’ top three Scottish destinations remain Edinburgh and the Lothians, Greater Glasgow and the Clyde Valley, and the Highlands and Islands. While there are still no direct flights between Scotland and Australia, Australians make good use of the connections to Amsterdam, Dubai and as of 2018, England.
Latest Information
Visitors from Australia to Scotland

Key Figures Overview, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Scotland</td>
<td>172,000</td>
<td>+10%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>1,801,000</td>
<td>+19%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£152,961,000</td>
<td>+14%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>10.5 nights</td>
<td>+9%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£85</td>
<td>-4%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£889</td>
<td>+4%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay

- 1-3 nights (4%)
- 4-7 nights (10%)
- 8-14 nights (31%)
- 15+ nights (55%)

Purpose of travel

- Business (3%)
- Holiday (53%)
- VFR* (43%)
- Other (<1%)

Seasonality

- Jan-Mar (13%)
- Apr-Jun (27%)
- Jul-Sep (44%)
- Oct-Dec (16%)

Age

- 16-24 (11%)
- 25-34 (15%)
- 35-44 (16%)
- 45-54 (19%)
- 55-64 (19%)
- 65+ (20%)

All charts are based on 3-year average data (2016-2018); * VFR = Visiting friends or relatives. Source: IPS.
Visitors from Australia Compared to Other Overseas Markets: Trips, Nights and Spend – Value and Percent of Total, 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips</th>
<th>Spend</th>
<th>Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000s</td>
<td>%</td>
<td>£m</td>
</tr>
<tr>
<td>USA</td>
<td>492</td>
<td>14%</td>
<td>438</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>13%</td>
<td>246</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>9%</td>
<td>209</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>8%</td>
<td>110</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>6%</td>
<td>79</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>5%</td>
<td>153</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>5%</td>
<td>86</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>4%</td>
<td>117</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>3%</td>
<td>74</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>3%</td>
<td>40</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,102</td>
<td>31%</td>
<td>653</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>3,538</td>
<td>100%</td>
<td>2,206</td>
</tr>
</tbody>
</table>

Source: IPS, 2018. Figures may not sum up due to rounding.
Inbound Tourism | UK & Scotland
Visitors from Australia

**Trips of Australian residents to the UK and Scotland: Total and Average Figures, 2018**

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>Total visits</td>
<td>1,003,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td></td>
</tr>
<tr>
<td>Total nights</td>
<td>12,618,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£1,044,360,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>12.6 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£83</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£1,041</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
*3-year average (2016-2018).

Visits from Australia to the UK dropped from 1.09m in 2017 to 1m in 2018 (-8%), while total spend decreased by £150m (-13%) for the same period.

Despite that, more Australian residents travelled to Scotland and spent more money during their trips compared to 2017. Total visits increased by 15,000 (+10%) and total expenditure rose by £19m (+14%) to reach £153m in 2018. An increasingly bigger proportion of Australian tourists are coming to Scotland to visit friends and relatives, however the majority of people still cite ‘holiday’ as the main reason for their trip.

Australians’ length of stay in Scotland also increased significantly in 2018. The number of nights spent jumped by 291,000, or about a fifth of the 2017 figure, making up 7% of the total for international visitors in 2018.

**In 2018, Australia was**

**The UK’s**
- 10th largest source market measured by number of visits
- 5th largest by number of nights
- 5th largest by expenditure

**Scotland’s**
- 6th largest international source market measured by number of visits
- 4th largest by number of nights
- 4th largest by expenditure

Source: IPS, 2018.
INSIGHT DEPARTMENT: AUSTRALIA FACTSHEET 2018

Australian Visitors Heat Map
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

Edinburgh & the Lothians

Greater Glasgow, Clyde Valley

Highlands & Islands

Darker areas = more visitors
Source: IPS, 2018.

Australian visitors to Scotland tend to stay longer and travel more within the country. Out of Scotland’s top ten source markets measured by number of visits, Australia ranks third in average number of regions visited (regional spread) after USA and Canada in 2018.

On average, each Australian visitor explored 1.63 Scottish regions during their stay in 2018. This compares to a total international average of 1.41 regions per visitor for the same period. Traditionally, the most frequented regions remain Edinburgh and the Lothians (112,000 visits), Greater Glasgow and the Clyde Valley (66,000 visits) and the Highlands and Islands (35,000 visits).

*Due to sample size and International Passenger Survey’s (IPS) methodology in the collection and publishing of tourist data, the flow of visitors within Scotland is analysed on a regional level. Each region consists of council areas as listed below.*

Regional Map Legend

**Ayrshire & Arran** = East Ayrshire, North Ayrshire, South Ayrshire; **Dumfries & Galloway** = Dumfries and Galloway; **Dundee & Angus** = Angus, Dundee City; **Fife** = Fife; **Grampian** = Aberdeen City, Aberdeenshire, Moray; **Highlands & Islands** = Highland, Na h-Eileanan Siar, Orkney Islands, Shetland Islands; **Edinburgh & the Lothians** = City of Edinburgh, East Lothian, Midlothian, West Lothian; **Perthshire** = Perth and Kinross; **Scottish Borders** = Scottish Borders; **Greater Glasgow, Clyde Valley** = East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire; **Loch Lomond, Stirling, Trossachs, Argyll** = Argyll and Bute, Clackmannanshire, Falkirk, Stirling.
Visitors from Australia to Scotland
Historical Trend Information | 2009 - 2018

2018 was the most successful year in the last decade in terms of visits, stay and spend by Australian visitors to Scotland. Following a decline in 2015/16, the trend of growth continued in 2018, marking a 30% increase in visits, 33% increase in nights and 50% increase in total expenditure compared to 2016 levels. Scotland’s total international inbound market grew by 29% in terms of visits, 14% in terms of nights and 19% in terms of total spend between 2016 and 2018.

Inbound Tourism Volume and Value Trend, 2009-2018

Source: IPS.

Total Visits, Nights & Spend, 2009-2018

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</thead>
<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>111</td>
<td>148</td>
<td>130</td>
<td>127</td>
<td>138</td>
<td>158</td>
<td>142</td>
<td>132</td>
<td>157</td>
<td>172</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>1,399</td>
<td>1,345</td>
<td>1,413</td>
<td>1,335</td>
<td>1,152</td>
<td>1,674</td>
<td>1,407</td>
<td>1,354</td>
<td>1,510</td>
<td>1,801</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>72</td>
<td>95</td>
<td>103</td>
<td>98</td>
<td>102</td>
<td>129</td>
<td>126</td>
<td>102</td>
<td>134</td>
<td>153</td>
</tr>
</tbody>
</table>

Source: IPS.
Average Australian Visit
Historical Trend Information | 2009 - 2018

In 2018, Australians stayed one more night in Scotland and spent £35 more during their visit on average compared to 2017. Average length of stay has levelled off at around 10 nights over the last five years, while average spend per visit has been on the rise since the decline in 2016, reaching its highest level over the last decade in 2018. Australian visitors to Scotland stayed **3.6 nights longer (+53%)** and spent **£266 more per visit (+43%)** compared to the average overseas visitor in 2018.

**Average Length of Stay and Spend Trend, 2009-2018**

![Graph showing trend of average length of stay and spend per visit from 2009 to 2018.]

Source: IPS.

**Average Length of Stay, Daily and Total Spend, 2009-2018**

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</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Length of Stay (Nights)</strong></td>
<td>12.6</td>
<td>9.1</td>
<td>10.9</td>
<td>10.5</td>
<td>8.3</td>
<td>10.6</td>
<td>9.9</td>
<td>10.3</td>
<td>9.6</td>
<td>10.5</td>
</tr>
<tr>
<td><strong>Average Spend per Day (£)</strong></td>
<td>51</td>
<td>71</td>
<td>73</td>
<td>73</td>
<td>89</td>
<td>77</td>
<td>89</td>
<td>75</td>
<td>89</td>
<td>85</td>
</tr>
<tr>
<td><strong>Average Spend per Visit (£)</strong></td>
<td>648</td>
<td>644</td>
<td>793</td>
<td>771</td>
<td>739</td>
<td>819</td>
<td>885</td>
<td>773</td>
<td>856</td>
<td>889</td>
</tr>
</tbody>
</table>

Source: IPS.
Outbound Tourism
Visitors to Australia

<p>| Trips and Spend of Residents of the UK and Scotland in Australia, 2018 |
|---------------------------------|-----------------|-----------------|-----------------|</p>
<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Australia</td>
<td>UK 356,000</td>
<td>-21%</td>
</tr>
<tr>
<td></td>
<td>Scotland 72,000</td>
<td>+47%</td>
</tr>
<tr>
<td>Total spend in Australia</td>
<td>UK £574,907,000</td>
<td>-30%</td>
</tr>
<tr>
<td></td>
<td>Scotland £86,986,000</td>
<td>-42%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>UK £1,615</td>
<td>-11%</td>
</tr>
<tr>
<td></td>
<td>Scotland £1,208</td>
<td>-61%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

2018 saw a substantial decrease in the amount of UK residents travelling to Australia. The trips undertaken were 96,000 less (-21%), while total expenditure dropped by £245m, or almost a third of the 2017 levels. Nevertheless, the UK remained one of the top tourist inbound markets for Australia. According to Tourism Australia, in 2018 the UK was Australia's 4th largest source market measured by number of visits, 2nd largest by number of nights, 3rd largest by expenditure and 1st in terms of regional spread.

As a destination, Australia amounted to 0.5% of the total UK outbound tourism in terms of visits and 1.3% in terms of spend. Its proportion of Scotland’s overseas tourism was significantly higher, constituting 1.6% of all international trips undertaken by Scottish residents, and 2.9% of their total overseas spend in 2018. This can be partially explained by the strong ancestral ties between the UK and Australia (66% of all UK residents who travelled to Australia in 2018 visited friends or relatives) which are more pronounced in Scotland as percent of the total population.

Trips undertaken by Scottish residents to Australia jumped by almost a half from their 2017 levels. Despite that, total expenditure dropped by £64m, marking a 61% decrease in average spend per visit in 2018.

In 2018, Australia was

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>32nd most popular destination measured by number of visits</td>
<td>13th most popular destination measured by number of visits</td>
</tr>
<tr>
<td>18th by expenditure</td>
<td>9th by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
Motivations to Visit Scotland

**MOTIVATIONS TO VISIT SCOTLAND**

- **Scenery & landscape** 49% (survey average 50%)
- **History & culture** 48% (survey average 33%)
- **Always wanted to visit** 30% (survey average 15%)
- **My Scottish ancestry** 27% (survey average 9%)
- **Visit family/friends who live in Scotland** 26% (survey average 21%)

Scotland's vast and breath-taking landscape is a key motivator for Australian travellers to visit. History and culture is also important, but less so in comparison to North American markets.

**CONNECTIONS TO SCOTLAND**

- **68%** of visitors from Australia had a connection to Scotland. The most common connections were:
  - Ancestors live in Scotland 34%
  - Family live in Scotland 26%
  - Friends live in Scotland 15%
  - Lived in/grew up in Scotland 12%

Visitors from Australia report a high proportion of ancestral links to Scotland, slightly lower than Canada. Australian visitors were most likely of the long-haul markets to have lived in Scotland previously and to have family connections here.

Source: Scotland Visitor Survey 2015/2016
Recent Consumer Trends and Attitudes

PLANNING & BOOKING

Australian visitors tend to plan furthest ahead, unsurprising given they have the greatest travel distance.

Planning: 42.7 weeks
Travel booking: 22.4 weeks
Accommodation booking: 19.3 weeks

Australian visitors are likely to use the web and web search when planning their holiday. Travel review websites are particularly popular. They are also more likely to talk with friends and family when planning a visit and seek out personal advice from travel agents.

TRANSPORT TO SCOTLAND

The key point of arrival to the UK for most Australian visitors was via Heathrow airport.

Scotland currently has good connectivity from Australia via the 3 Middle Eastern hubs of Dubai, Abu Dhabi and Doha, as well as the key European hubs of Paris and Amsterdam (all being indirect one stop flights).

TOP 5 ACTIVITIES IN SCOTLAND

- Sightseeing by car/coach/on foot 88% (survey average 74%)
- Visited castle/historic house 81% (survey average 60%)
- Visited cathedral, church 78% (survey average 46%)
- Centre based walking (i.e around a town centre) 63% (survey average 45%)
- Visited cities 62% (survey average 42%)

Visitors from Australia are very active and participate in many activities during their trip. They particularly enjoy sightseeing and visiting historical/religious sites.

Further down the list of activities, but the highest across all long-haul markets was:

- Genealogy/tracing ancestors 16%

Source: Scotland Visitor Survey 2015/2016
Accommodation Preferences

- **Hotel 56%**
  - (survey average 41%)

- **B&B/GH 35%**
  - (survey average 20%)

- **Friends/family 28%**
  - (survey average 19%)

- **Self-catering 24%**
  - (survey average 22%)

- **Airbnb 15%**
  - (survey average 5%)

Aspects Important in Choosing Accommodation:

- **Location** 84%
- **Value for Money** 62%
- **Availability of free Wi-Fi at accommodation** 55%
  - highest for all markets included
- **Quality star grading** 35%

Source: Scotland Visitor Survey 2015/2016
Overall satisfaction rates for long-haul visitors are extremely positive and Australia is no exception. Nearly half of visitors from Australia rated their overall holiday experience a 10 out of 10.

### Satisfaction with the Visitor Experience

<table>
<thead>
<tr>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall rating of Holiday Experience (scale 1-10)</td>
<td>9.1</td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>9.2</td>
</tr>
</tbody>
</table>

**52% strongly agree**
that ‘Scotland is a country worth visiting more than once’

**44% strongly agree**
that ‘they were made to feel really welcome’

**37% strongly agree**
that ‘the local people I met during my visit really added to the holiday experience’

Areas of the visitor experience which recorded mean scores below 8 include:

- Availability of local produce when eating out
- Value for money of eating out
- Mobile phone signal coverage
- Availability of 3G/4G

Source: Scotland Visitor Survey 2015/2016
Popular media channels

Research with consumers from Australia on VisitScotland’s database has provided examples of key media channels used by these consumers.

**Key Websites Used**
- Facebook
- Google
- Email (Gmail etc)
- Nine.com.au
- Yahoo
- ABC News
- Banking
- Ancestry UK
- News.com.au
- eBay
- Sydney Morning Herald

**Key Social Media Accounts**
- Facebook
- TripAdvisor
- YouTube
- Google+
- Pinterest
- Linkedin
- Instagram
- Whatsapp

**Key Newspapers Read (online or print)**
- Sydney Morning Herald
- The Australian
- The Age
- Herald Sun
- The West Australian
- Courier Mail
- The Guardian
- Daily Telegraph
- ABC News
- Canberra Times

**Key Magazines Read (Online or in print)**
- Women’s Weekly
- Women’s Day
- New Idea
- Take Five
- Better Homes and Gardens

**Influential TV Programmes for Travel**
- Outlander
- Coast
- History of Scotland
- Hamish Macbeth
- Edinburgh Military Tattoo
- Braveheart

Source: VisitScotland Research 2014/2017
Barriers to Travel

Although Scotland is viewed as a desirable place to visit, especially due to family connections, we need to be aware of the range of barriers which may be in the minds of Australian visitors when choosing their holiday destination.

- Changing travel markets means Australia now has more Asian immigrants than from the UK. The younger Australian generation have less affinity with Britain and motivation to visit friends and family in Scotland may be falling.
- Travel motivations such as scenery and landscape and history and culture score lower than other long-haul markets surveyed. With a risk of losing visitors with connections, Scotland must ensure it has something that makes it an appealing destination for those without connections to the country.
Appendix

International Passenger Survey 2018

USING AND INTERPRETING STATISTICAL DATA
Sources: Data is sourced from the Office for National Statistics’ International Passenger Survey (IPS). Information about the survey can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section) or the Office for National Statistics website www.statistics.gov.uk/hub/index.html.

Sample Sizes: Analysis of sub-groups, such as trips by purpose or demographic group, relies on small 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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Front Cover: Dunnottar Castle
Back Cover: Kinnoull Hill and Tower
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