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.

Significant increases in visitor figures made Canada Scotland’s eighth largest source market measured by number of visits and fifth largest measured by number of nights and total expenditure in 2018.

Total trips of Canadian residents to Scotland increased by 14%, while total nights rose by 19% in 2018. The most notable growth was observed in total expenditure which increased by almost a third from 2017. These figures form part of a historical trend of market growth, particularly in the past three to five years.

Most Canadian visits to Scotland occur during the summer and nearly three quarters of all trips last longer than a week. Over half of the Canadian travellers to Scotland come on a holiday, but due to the strong ancestral links between the two countries, visiting friends or relatives also forms a large proportion of trips (two out of five). The majority of tourists are over 45-years-old, but all age groups are represented well in the Canadian visitor mix.

As long-haul visitors, Canadians stay longer and spend more money during their trip compared to the average overseas tourist. Among all international markets, Canada ranks second in terms of the average number of Scottish regions visited (regional spread) over the last ten years.
Latest Information
Visitors from Canada 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>131,000</td>
<td>+14%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>1,269,000</td>
<td>+19%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£117,060,000</td>
<td>+30%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>9.7 nights</td>
<td>+5%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£92</td>
<td>+8%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£894</td>
<td>+14%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay
- 1-3 nights (3%)
- 4-7 nights (24%)
- 8-14 nights (50%)
- 15+ nights (22%)

Purpose of travel
- Business (3%)
- Holiday (56%)
- VFR* (40%)
- Other (1%)

Seasonality
- Jan-Mar (9%)
- Apr-Jun (25%)
- Jul-Sep (47%)
- Oct-Dec (19%)

Age
- 16-24 (9%)
- 25-34 (19%)
- 35-44 (14%)
- 45-54 (20%)
- 55-64 (23%)
- 65+ (14%)

All charts are based on 3-year average data (2016-2018); * VFR = Visiting friends or relatives. Figures may not sum up due to rounding. Source: IPS.
International Tourism Figures
Top 10 Overseas Markets

Visitors from Canada 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>£m</td>
<td>000s</td>
</tr>
<tr>
<td>USA</td>
<td>492</td>
<td>438</td>
<td>3,907</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>246</td>
<td>2,818</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>209</td>
<td>1,985</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>110</td>
<td>1,220</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>79</td>
<td>1,192</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>153</td>
<td>1,801</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>86</td>
<td>945</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>117</td>
<td>1,269</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>74</td>
<td>605</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>40</td>
<td>338</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,102</td>
<td>653</td>
<td>8,158</td>
</tr>
</tbody>
</table>

**Total** 3,538 2,206 24,237

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

Trips of Canadian Residents to the UK and Scotland: Total and Average Figures, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>Total visits</td>
<td>850,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>42% VFR</td>
</tr>
<tr>
<td></td>
<td>39% Holiday</td>
</tr>
<tr>
<td></td>
<td>9% Business</td>
</tr>
<tr>
<td></td>
<td>9% Other</td>
</tr>
<tr>
<td>Total nights</td>
<td>7,759,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£673,778,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>9.1 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£87</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£793</td>
</tr>
</tbody>
</table>

Source: IPS. Figures may not sum up due to rounding.
*3-year average (2016-2018).

The UK was a slightly more popular destination for Canadian travellers in 2018. Trips to the UK increased by 2% and while Canadians stayed less than in 2017 (total nights decreased by nearly half a million), total expenditure marked a significant growth of 12%, or over £71m.

This positive trend was even more pronounced in Scotland, where total visits increased by 16,000 (+14%) and total nights rose by 206,000 (+19%) in 2018. The most significant growth was in total expenditure which increased by almost a third (£27m more, or +30%) from 2017. The majority of Canadian tourists travel to Scotland for a holiday. In 2018, their percentage of the visitor mix continued to increase, while business trips declined in numbers. Average length of stay and spend of Canadians was higher in Scotland than in the UK overall.

In 2018, Canada climbed up in the list of top overseas tourism markets, becoming Scotland’s eighth largest market measured by number of visits (from tenth largest in 2017) and fifth largest market by total expenditure (from seventh largest in 2017).

In 2018, Canada was

**The UK’s**
- 12th largest source market measured by number of visits
- 12th largest by number of nights
- 9th largest by expenditure

**Scotland’s**
- 8th largest international source market measured by number of visits
- 5th largest by number of nights
- 5th largest by expenditure

Source: IPS, 2018.
Canadian 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.

Similarly to other long-haul visitors such as US and Australian, Canadian tourists tend to stay in Scotland more than a week and travel a lot across its regions. Out of all international markets, Canada ranks second in regional spread for the period between 2009 and 2018 (1.73 regions* per visit on average).

On average, each Canadian visitor explored 1.74 Scottish regions during their stay in 2018. The total international average for the same period was 1.41 regions per visitor. Traditionally, the most frequently regions in 2018 were Edinburgh and the Lothians (81,000 visits), Greater Glasgow and the Clyde Valley (48,000 visits) and the Highlands and Islands (33,000 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 at 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.
2018 was the **second best year over the last ten years** in terms of visits, stay and spend by Canadian residents traveling to Scotland, preceded only by the peak 2016. Annual variability of figures increased in the past five years, but the general market trend is continued growth. Average yearly trips rose from 100,000 to 123,000 (+23%), while average total expenditure increased from £72m to £98m (+37%) between 2009-2013 and 2014-2018. These figures are in line with the overall growth in overseas tourism in Scotland which marked a 24% increase in trips and a 34% increase in spend between the same time periods.

**Inbound Tourism Volume and Value Trend, 2009-2018**

![Graph showing inbound tourism volume and value trend from 2009 to 2018.](image-url)

Source: IPS.

**Total Visits, Nights & Spend, 2009-2018**

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<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>102</td>
<td>98</td>
<td>103</td>
<td>90</td>
<td>106</td>
<td>122</td>
<td>98</td>
<td>149</td>
<td>115</td>
<td>131</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>1,091</td>
<td>954</td>
<td>1,207</td>
<td>1,046</td>
<td>1,068</td>
<td>1,109</td>
<td>985</td>
<td>1,370</td>
<td>1,063</td>
<td>1,269</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>56</td>
<td>65</td>
<td>83</td>
<td>78</td>
<td>77</td>
<td>88</td>
<td>66</td>
<td>130</td>
<td>90</td>
<td>117</td>
</tr>
</tbody>
</table>

Source: IPS.
Average Canadian Visit

Historical Trend Information | 2009 - 2018

Unlike the majority of international visitors to Scotland, Canadian tourists stayed longer on average in 2018. Looking at the figures from the last decade, average length of stay slowly decreased from 2011-2012 levels to reach **nine and a half nights** on average in the past five years. Annual variability in average spend per trip followed a similar pattern until 2015. However, figures increased significantly in 2016-2018 due to a notable rise in average daily spend. In 2018, Canadian travellers to Scotland stayed **2.8 more nights** and spent **£270 more per trip** compared to the average overseas visitor.

Average Length of Stay and Spend Trend, 2009-2018

![Graph showing average length of stay and spend trend, 2009-2018](image)

Source: IPS.

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

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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Length of Stay (Nights)</strong></td>
<td>10.7</td>
<td>9.7</td>
<td>11.7</td>
<td>11.6</td>
<td>10.1</td>
<td>9.1</td>
<td>10.1</td>
<td>9.2</td>
<td>9.2</td>
<td>9.7</td>
</tr>
<tr>
<td><strong>Average Spend per Day (£)</strong></td>
<td>51</td>
<td>68</td>
<td>68</td>
<td>75</td>
<td>72</td>
<td>79</td>
<td>67</td>
<td>95</td>
<td>85</td>
<td>92</td>
</tr>
<tr>
<td><strong>Average Spend per Visit (£)</strong></td>
<td>548</td>
<td>661</td>
<td>802</td>
<td>868</td>
<td>727</td>
<td>721</td>
<td>671</td>
<td>874</td>
<td>782</td>
<td>894</td>
</tr>
</tbody>
</table>

Source: IPS.
Outbound Tourism
Visitors to Canada

Trips and Spend of UK and Scottish Residents in Canada, 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 Canada</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>543,000</td>
<td>+5%</td>
</tr>
<tr>
<td>Scotland</td>
<td>71,000</td>
<td>+45%</td>
</tr>
<tr>
<td>Total spend in Canada</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£530,077,000</td>
<td>-18%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£61,498,000</td>
<td>+38%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£976</td>
<td>-22%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£866</td>
<td>-5%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

While 2018 marked a 5% increase in visits by UK travellers to Canada, total expenditure declined by £117m (-18%) from 2017. According to Destination Canada, the UK remained Canada’s largest long-haul tourism source market in 2018.

The average UK resident spent 14.2 nights and £69 per day while in Canada which is hardly surprising considering the great distance between the two countries. The top reason to travel to Canada is visiting friends or relatives (42% of all trips), followed by going on a holiday (39%) and attending a business trip (9%).

As a destination, Canada amounted to 0.8% of the total UK outbound tourism in terms of visits and 1.2% in terms of expenditure in 2018. Its share of Scotland’s overseas tourism was nearly twice greater, constituting 1.6% of all international trips undertaken by Scottish residents, and 2% of their total overseas spend.

Trips made by Scottish residents to Canada grew by almost a half from their 2017 levels to reach 71,000. Total expenditure also increased significantly, but by a smaller fraction (+38%) which meant average spend per visit declined by £42 in 2018.

In 2018, Canada was

The UK’s
- 24th most popular destination measured by number of visits
- 20th by expenditure

Scotland’s
- 14th most popular destination measured by number of visits
- 11th by expenditure

Source: IPS, 2018.
Motivations to Visit Scotland

Scotland’s beautiful scenery and landscape is a strong motivator for Canadian visitors, along with the history and culture. Strong ancestral links to Scotland may encourage visitors from Canada to go “off the beaten track”. For those on a specific ancestral visit, sightseeing, researching ancestry and “walking in their footsteps” are key elements of a trip.

70% of visitors from Canada had a connection to Scotland. The most common connections were:

- Had ancestors who lived in Scotland 38%
- Family live in Scotland 23%
- Friends live in Scotland 17%

Visitors from Canada report the highest ancestral links compared to other long-haul (USA, Australia) and European markets included in the visitor survey. Canadian visitors are also more likely to have family and friends in Scotland than their counterparts in the USA.

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

TRANSPORT TO SCOTLAND

54% of visitors arrived by plane directly to Scotland. The most popular airports to arrive to were:

- Glasgow 59%
- Edinburgh 27%

29% arrived by plane (indirect):
- London Heathrow 28%
- Dublin Airport 23%

Direct flights are more readily available to Scotland from Canada in comparison to long-haul markets which helps explain why more Canadians choose to fly directly to Scotland.

PLANNING & BOOKING

On average, visitors from Canada start to plan about 9 months ahead. Canadian visitors tend to plan further ahead than European markets, but less than other long-haul markets.

Planning: 36.4 weeks
Travel booking: 20.6 weeks
Accommodation booking: 19.0 weeks

Canadian visitors are most likely to talk with friends and family when planning their holiday. However, the use of printed travel guide books such as The Lonely Planet, Rough Guide or Fodors are also valuable as well as personal advice from travel professionals. Canadians are also more likely than average to use apps to aid their travel planning.

TOP 5 ACTIVITIES IN SCOTLAND

- Sightseeing by car/coach/on foot 88% (survey average 74%)
- Visited castle/historic house 88% (survey average 60%)
- Visited cathedral, church 85% (survey average 46%)
- Visited cities 74% (survey average 42%)
- Visited a museum/art gallery 72% (survey average 45%)

Visitors from Canada are very active and enjoy undertaking a range of activities during their break in Scotland. Scenery, history and culture is a key factor for Canadians choice of holiday and this is reflected in their top activities.

Further down the list of activities but notably higher for visitors from Canada than others were:

- Attended Highland Games 22%

Source: Scotland Visitor Survey 2015/2016
Accommodation Preferences

ACCOMMODATION

Accommodation preferences:

- **Hotel** 57%  
  (survey average 41%)
- **B&B/GH** 36%  
  (survey average 20%)
- **Friends/Family** 24%  
  (survey average 19%)
- **Self-catering** 18%  
  (survey average 22%)
- **Airbnb** 11%  
  (survey average 5%)

Aspects important in choosing accommodation:

- **Location** 77%
- **Value for Money** 62%
- **Availability of free Wi-Fi at accommodation** 39%
- **Quality star grading** 35%

Source: Scotland Visitor Survey 2015/2016
Overall satisfaction rates for long-haul visitors are extremely positive. Over half (51%), of Canadians rated their overall holiday experience a 10 out of 10.

<table>
<thead>
<tr>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.2</td>
<td>79%</td>
</tr>
<tr>
<td>9.3</td>
<td>82%</td>
</tr>
</tbody>
</table>

62% strongly agree that ‘Scotland is a country worth visiting more than once’

51% strongly agree that ‘the local people I met during my visit really added to the holiday experience’

49% strongly agree that ‘they were made to feel really welcome’

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
- Availability of free Wi-Fi
- Availability of free Wi-Fi at accommodation

Source: Scotland Visitor Survey 2015/2016
Popular media channels

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

**Key Websites Used**
- Google
- Facebook
- Hotmail
- MSN
- Yahoo
- BBC
- CBC
- Banking
- Sympatico.ca
- Expedia
- Weather Network

**Key Social Media Accounts**
- Facebook
- TripAdvisor
- YouTube
- Google+
- Pinterest
- LinkedIn
- Instagram
- Twitter

**Key Newspapers Read (online or print)**
- The Globe and Mail
- Toronto Star
- Vancouver Sun
- Ottawa Citizen
- Toronto Sun
- National Post
- New York Times

**Key Magazines Read (online or in print)**
- Macleans
- Canadian Living
- Chatelaine
- National Geographic
- People Magazine
- Readers Digest
- Our Canada

Source: VisitScotland Research 2014-2017
Barriers to Travel

Although Scotland enjoys a positive image amongst visitors from Canada, we need to be aware of the range of barriers which may be in the mind-set of visitors when considering their holiday destination.

- Canadians place high importance on value for money, so cost is considered a critical factor in choosing a holiday destination. While still fairly high, Canadians had lower satisfaction scores of value for money and food, ranking below an 8 for both. Therefore Scotland may be perceived as a more expensive choice.

- Weather may be a barrier. Often described as “Snowbird Travel” Canadians may wish to escape from their own harsh weather conditions and opt for hotter places instead. It is important that the encouraging factors outweigh the perceived disadvantage of the weather when marketing Scotland to Canadians.
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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