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.

In 2018, Spain was Scotland’s fifth largest international source market measured by number of visits, seventh largest by number of nights and eight largest by total expenditure.

Total visits by residents of Spain to Scotland grew by more than two-thirds to exceed 200,000, while total nights nearly doubled from 2017. Nevertheless, total expenditure declined by 27% which was partly driven by a significant increase in trips to visit friends and relatives. In the context of the past ten years, 2018 was characterised by a record-high number of visits and a total expenditure almost identical to the annual average for 2009-2018.

Average visitor figures for the 2016-2018 period indicate that trips of Spanish residents to Scotland are fairly evenly distributed across the calendar year. The most popular season to visit was winter, with 30% of all trips occurring between January and March. The majority of Spanish travellers come on a holiday, but an increasingly higher proportion of the trips are motivated by visiting friends or relatives (29%). A significant rise in short trips in 2018 meant that 85% of all visits in 2016-2018 lasted less than a week.

Spanish tourists visit mainly high-profile destinations. Edinburgh and the Lothians, Greater Glasgow and the Clyde Valley, and the Highlands and Islands remain the most popular regions.
Latest Information
Visitors from Spain 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>205,000</td>
<td>+68%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>1,192,000</td>
<td>+98%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£79,471,000</td>
<td>-27%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>5.8 nights</td>
<td>+18%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£67</td>
<td>-63%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£388</td>
<td>-57%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay

- 1-3 nights (27%)
- 4-7 nights (58%)
- 8-14 nights (6%)
- 15+ nights (8%)

Purpose of travel

- Business (11%)
- Holiday (59%)
- VFR* (29%)
- Other (1%)

Seasonality

- Jan-Mar (30%)
- Apr-Jun (19%)
- Jul-Sep (28%)
- Oct-Dec (22%)

Age

- 16-24 (11%)
- 25-34 (25%)
- 35-44 (27%)
- 45-54 (12%)
- 55-64 (19%)
- 65+ (6%)

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 Spain Compared to Other Overseas Markets: Trips, Nights and Spend – Value and Percent of Total, 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips 000s</th>
<th>%</th>
<th>Spend £m</th>
<th>%</th>
<th>Nights 000s</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>492</td>
<td>14%</td>
<td>438</td>
<td>20%</td>
<td>3,907</td>
<td>16%</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>13%</td>
<td>246</td>
<td>11%</td>
<td>2,818</td>
<td>12%</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>9%</td>
<td>209</td>
<td>9%</td>
<td>1,985</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>8%</td>
<td>110</td>
<td>5%</td>
<td>1,220</td>
<td>5%</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>6%</td>
<td>79</td>
<td>4%</td>
<td>1,192</td>
<td>5%</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>5%</td>
<td>153</td>
<td>7%</td>
<td>1,801</td>
<td>7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>5%</td>
<td>86</td>
<td>4%</td>
<td>945</td>
<td>4%</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>4%</td>
<td>117</td>
<td>5%</td>
<td>1,269</td>
<td>5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>3%</td>
<td>74</td>
<td>3%</td>
<td>605</td>
<td>2%</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>3%</td>
<td>40</td>
<td>2%</td>
<td>338</td>
<td>1%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,102</td>
<td>31%</td>
<td>653</td>
<td>30%</td>
<td>8,158</td>
<td>34%</td>
</tr>
<tr>
<td>Total</td>
<td>3,538</td>
<td>100%</td>
<td>2,206</td>
<td>100%</td>
<td>24,237</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

Trips of Spanish 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>2,531,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>41% Holiday</td>
</tr>
<tr>
<td></td>
<td>36% VFR</td>
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<tr>
<td></td>
<td>17% Business</td>
</tr>
<tr>
<td></td>
<td>5% Other</td>
</tr>
<tr>
<td>Total nights</td>
<td>15,185,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£1,109,785,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>6.0 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£73</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£439</td>
</tr>
</tbody>
</table>

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

Residents of Spain travelled more to the UK in 2018, with total visits increasing by 5% from 2017. While the number of nights they spent decreased by almost a tenth from the previous year, total expenditure also rose by 5% to exceed £1.1 billion in 2018.

Figures for Scotland reveal much greater annual variations which could be explained by changing visitor trends but also smaller sample sizes. IPS estimates that total visits of Spanish residents to Scotland increased significantly by two-thirds and total nights almost doubled in 2018. Despite that, total expenditure declined by over a quarter to total around £80 million. It is likely that these changes are largely driven by a notable increase in less-than-week-long trips to visit friends or relatives which are usually characterised by smaller expenses. VFR trips by Spanish residents grew from 22% of all trips in 2015-2017 to 29% in 2016-2018.

In 2018, Spain became Scotland’s fifth largest market measured by number of visits (from eight largest in 2017) and eight largest by total expenditure (from fourth largest in 2017).

In 2018, Spain was

The UK’s
- 5th largest source market measured by number of visits
- 4th largest by number of nights
- 4th largest by expenditure

Scotland’s
- 5th largest international source market measured by number of visits
- 7th largest by number of nights
- 8th largest by expenditure

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

Popular Destinations
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

Edinburgh & the Lothians
Greater Glasgow, Clyde Valley
Highlands & Islands

Visitors from Spain tend to visit mainly well-established tourist destinations. Edinburgh and the Lothians, Greater Glasgow and the Clyde Valley, and the Highlands and Islands are the regions most frequented by Spanish travellers. Average figures suggest that between 2016 and 2018 they were visited 110,000, 24,000 and 18,000 times per year, respectively, by residents of Spain.

Due to International Passenger Survey’s (IPS) methodology in the collection and publishing of tourist data, the flow of overseas visitors within Scotland is analysed at a regional level. Small regional sample sizes for visitors from Spain make regional analysis possible only for the top three regions listed above. Each of these consists of council areas as follows:

Edinburgh & the Lothians = City of Edinburgh, East Lothian, Midlothian, West Lothian;
Greater Glasgow, Clyde Valley = East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire;
Highlands & Islands = Highland, Na h-Eileanan Siar, Orkney Islands, Shetland Islands.
Visitors from Spain to Scotland
Historical Trend Information | 2009 - 2018

According to the latest figures, 2018 was the **most successful year in the last decade in terms of visits** by Spanish residents to Scotland. Following the record-low in recent years 2016 (lowest in terms of visits since 2003), the 2017 trend of growth continued in 2018 which was marked by a significant increase in trips to visit friends and relatives. The rise in tourist numbers led to a rise in total nights which was significant in the context of the last three years but below the average for the last decade. While total expenditure declined from 2017, it was slightly above the £79 million average for the last ten years.

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

![Inbound Tourism Volume and Value Trend, 2009-2018](image)

Source: IPS.

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

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>171</td>
<td>140</td>
<td>132</td>
<td>114</td>
<td>93</td>
<td>101</td>
<td>146</td>
<td>89</td>
<td>122</td>
<td>205</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>1,472</td>
<td>1,701</td>
<td>963</td>
<td>1,124</td>
<td>1,250</td>
<td>1,633</td>
<td>1,952</td>
<td>693</td>
<td>602</td>
<td>1,192</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>80</td>
<td>79</td>
<td>79</td>
<td>70</td>
<td>54</td>
<td>97</td>
<td>105</td>
<td>40</td>
<td>109</td>
<td>79</td>
</tr>
</tbody>
</table>

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

Figures indicate that unlike the majority of international visitors to Scotland, Spanish tourists stayed longer on average during their trip in 2018. Looking at the long-term trend, however, average length of stay decreased from 14 nights in 2013-2015 to 6 nights in 2016-2018. This is mostly result of a significant recent increase in trips shorter than a week which grew from 69,000 per year on average for 2013-2015 (61% of all trips) to 113,000 per year on average for 2016-2018 (85% of all trips). Average spend per trip in 2018 was lowest over the last decade. Since daily spend was well above the average for 2009-2018, this was mostly a result of the lower average length of stay.

Average Length of Stay and Spend Trend, 2009-2018

Source: IPS.

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

<table>
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</thead>
<tbody>
<tr>
<td>Average Length</td>
<td>8.6</td>
<td>12.2</td>
<td>7.3</td>
<td>9.9</td>
<td>13.4</td>
<td>16.2</td>
<td>13.4</td>
<td>7.8</td>
<td>4.9</td>
<td>5.8</td>
</tr>
<tr>
<td>of Stay (Nights)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>54</td>
<td>46</td>
<td>82</td>
<td>62</td>
<td>43</td>
<td>59</td>
<td>54</td>
<td>57</td>
<td>181</td>
<td>67</td>
</tr>
<tr>
<td>per Day (£)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>467</td>
<td>563</td>
<td>598</td>
<td>611</td>
<td>581</td>
<td>959</td>
<td>721</td>
<td>447</td>
<td>893</td>
<td>388</td>
</tr>
<tr>
<td>per Visit (£)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Source: IPS.
## Outbound Tourism

### Visitors to Spain

### Trips and Spend of UK and Scottish Residents in Spain, 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 Spain</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>15,618,000</td>
<td>-2%</td>
</tr>
<tr>
<td>Scotland</td>
<td>1,143,000</td>
<td>-1%</td>
</tr>
<tr>
<td>Total spend in Spain</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£8,907,944,000</td>
<td>+3%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£711,553,000</td>
<td>+15%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£570</td>
<td>+4%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£623</td>
<td>+16%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

2018 did not differ much from 2017 in terms of outbound tourism by UK travellers to Spain. Trips decreased by a quarter of a million which equates to a 2% decline, while total spend increased by £225m, or 3% from 2017. Spain remained the UK’s most popular destination. The UK was again Spain’s largest tourism source market measured by number of visitors in 2018.

The average UK resident spent 8.7 nights and £66 per day while in Spain which is slightly longer in terms of time, but similar in terms of expenditure, compared to the average trip to Europe. Nine out of ten UK visits to Spain were holiday trips, and only 8% of the trips were motivated by visiting friends or relatives.

As a destination, Spain amounted to 21.8% of the total UK outbound tourism in terms of visits and 19.6% in terms of expenditure in 2018. Its share of Scotland’s overseas tourism was even more massive, constituting the impressive 25.8% of all international trips undertaken by Scottish residents, and 23.5% of their total overseas spend.

Visits by Scottish residents to Spain fell marginally by 1% in 2018. However, total expenditure increased by over £90m (+15%) marking an £88 rise in average spend per visit from 2017.

### In 2018, Spain was

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Most popular destination measured by number of visits</td>
<td>• Most popular destination measured by number of visits</td>
</tr>
<tr>
<td>• Most popular by expenditure</td>
<td>• Most popular by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
Recent Consumer Trends and Attitudes

**MOTIVATIONS TO VISIT SCOTLAND**

- Scenery & landscape 61%  
  (survey average 50%)
- History & culture 49%  
  (survey average 33%)
- Always wanted to visit 45%  
  (survey average 15%)
- To visit cities 35%  
  (survey average 15%)
- Scotland’s reputation for friendly people 22%  
  (survey average 15%)

Scotland’s scenery is a stronger motivator for European visitors than average. For Spanish visitors in particular, to visit cities is a stronger motivator than other markets.

**CONNECTIONS TO SCOTLAND**

- 34% of Spanish visitors had a connection to Scotland. The most common connections were:
  - Friends live in Scotland 12%
  - Family live in Scotland 9%
  - No personal connections but had visited many times 4%

Visitors from Europe typically have lower personal connections to Scotland than long haul markets that may have ancestral links in Scotland. However, a fifth of Spanish visitors surveyed do have family or friends living in Scotland which may influence their visit.

**TRANSPORT TO SCOTLAND**

- 82% visitors arrived by plane directly to Scotland. The most popular airports to arrive were:
  - Edinburgh 81%
  - Glasgow 7%
  - Prestwick 9%

7% arrived by plane (indirect)

Approximately 8 in 10 visitors from Spain took a direct flight to Scotland. A larger proportion than Northern European markets where indirect flights and ferries are also used.

**PLANNING & BOOKING**

On average, visitors from Spain start to plan about 3 months ahead. They are more likely to leave planning until closer to their time of travel in comparison to North European markets who may be touring Scotland more widely.

- Planning: 11.3 weeks
- Travel booking: 9.8 weeks
- Accommodation booking: 8.6 weeks

Spanish visitors are very likely to seek information through websites and online media. Recommendations are also highly valued. They most often talk with friends and family, but may also call travel agents for professional advice.

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

TOP 5 ACTIVITIES IN SCOTLAND

- Visited cathedral, church 82% (survey average 46%)
- Visited castle/historic house 76% (survey average 60%)
- Visited a country park/garden 76% (survey average 43%)
- Visited cities 75% (survey average 42%)
- Centre based walking (i.e. around a town centre) 73% (survey average 45%)

Spanish visitors will participate in a range of activities while they are in Scotland. They are more likely than average to visit a cathedral, church or abbey and historical buildings as well as a visit to a county park or garden. City breaks are popular with Spanish visitors, as well as centre based walking.

Further down the list of activities but higher than average for visitors from Spain:

- Viewed Architecture/Buildings 51%
- Went on a Guided Tour 41%

source: Scotland Visitor Survey 2015/2016

ACCOMMODATION

Accommodation Preferences:

- Hotel 47% (survey average 41%)
- B&B/GH 36% (survey average 20%)
- Friends/family 21% (survey average 19%)
- Airbnb 12% (survey average 5%)
- Self-catering 10% (survey average 22%)

Aspects Important in Choosing Accommodation:

- Location 75%
- Value for Money 73%
- Availability of free Wi-Fi at accommodation 41%
- Quality star grading 38% (*highest figure in Europe*)

Source: Scotland Visitor Survey 2015/2016
Satisfaction with the Visitor Experience

Overall satisfaction rates for European visitors are extremely positive. 69% of Spanish visitors rated their experience in Scotland as 9 or 10 out of 10, the highest proportion for the European markets researched (France, Germany, Spain, Italy, The Netherlands). Spanish visitors show a strong intention to recommend Scotland compared to other markets.

<table>
<thead>
<tr>
<th>Overall rating of Holiday Experience (scale 1-10)</th>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.0</td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>9.2</td>
<td>77%</td>
</tr>
</tbody>
</table>

46% strongly agree that ‘Scotland is a country worth visiting more than once’

36% strongly agree That ‘they were made to feel really welcome’

38% strongly agree That ‘they really enjoyed finding out about the history and culture of a destination when I’m on holiday’

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

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

Source: Scotland Visitor Survey 2015/2016
Popular Media Channels

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

**Key Websites Used**
- Facebook
- Google
- Hotmail
- Yahoo
- Gmail
- Pais
- Mundo
- Correo

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

**Key Newspapers Read (online or print)**
- El Pais
- El Mundo
- La Vanguardia
- El Periodico
- 20 minutos
- ABC
- El Correo

**Key Magazines Read (online or in print)**
- National Geographic
- Hola
- Telva
- Viajes
- Fotogramas

**Influential TV Programmes for Travel**
- Outlander
- Madrileños por el mundo
- Viajar
- National Geographic

Source: VisitScotland Research 2014-2017
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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Back Cover: The Castle and Gardens of Mey, Highlands © 2018 VisitScotland / Kenny Lam

Published: October 2019