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.

Despite a decline in figures in comparison to 2017, USA remained Scotland’s largest source market measured by number of visits, number of nights and total expenditure in 2018.

Total trips of US residents to Scotland decreased by 74,000 (-13%), while total nights went down by over a million (-21%). Total expenditure declined by £118m (-21%) and this can be identified as the main reason for the £70m drop (-3%) in overall overseas spend in 2018. Nevertheless, analysis of market performance in the context of the past ten years shows a positive trend of growth, and total spend in 2018 was third highest over the last decade.

42% of all US trips to Scotland occur between July and September, and less than a quarter during the off-season between October and March. Two out of three travellers are holidaymakers, 22% visit friends or relatives and less than one in ten comes to Scotland on a business trip. As long-haul visitors, US residents tend to stay longer and spend more. In 2018, they spent one night (+14%) and £266 (+43%) more on average during their trip compared to the average international tourist.

US visitors also tend to travel a lot within Scotland and explore many of its regions. In 2018, USA ranked first among the top visitor markets in terms of the average number of regions visited (regional spread). Most popular regions were Edinburgh and the Lothians, the Highlands and Islands, and Greater Glasgow.
Latest Information
Visitors from the USA 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>492,000</td>
<td>-13%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>3,907,000</td>
<td>-21%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£437,857,000</td>
<td>-21%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>7.9 nights</td>
<td>-9%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£112</td>
<td>0%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£890</td>
<td>-9%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay

- 1-3 nights (7%)
- 4-7 nights (30%)
- 8-14 nights (49%)
- 15+ nights (15%)

Purpose of travel

- Business (9%)
- Holiday (67%)
- VFR* (22%)
- Other (3%)

Seasonality

- Jan-Mar (7%)
- Apr-Jun (35%)
- Jul-Sep (42%)
- Oct-Dec (16%)

Age

- 16-24 (10%)
- 25-34 (15%)
- 35-44 (14%)
- 45-54 (19%)
- 55-64 (22%)
- 65+ (20%)

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 USA 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><strong>Total</strong></td>
<td><strong>3,538</strong></td>
<td><strong>100%</strong></td>
<td><strong>2,206</strong></td>
<td><strong>100%</strong></td>
<td><strong>24,237</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

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

Visitors from the USA

<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><strong>Total visits</strong></td>
<td>3,877,000</td>
</tr>
<tr>
<td><strong>Visits by purpose</strong></td>
<td></td>
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<tr>
<td>46% Holiday</td>
<td></td>
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<tr>
<td>25% VFR</td>
<td></td>
</tr>
<tr>
<td>19% Business</td>
<td></td>
</tr>
<tr>
<td><strong>Total nights</strong></td>
<td>28,981,000</td>
</tr>
<tr>
<td><strong>Total spend</strong></td>
<td>£3,365,317,000</td>
</tr>
<tr>
<td><strong>Average length of stay</strong></td>
<td>7.5 nights</td>
</tr>
<tr>
<td><strong>Average spend per day</strong></td>
<td>£116</td>
</tr>
<tr>
<td><strong>Average spend per visit</strong></td>
<td>£868</td>
</tr>
</tbody>
</table>

Source: IPS, 2018. Figures may not sum up due to rounding.

*3-year average (2016-2018).

The number of US visitors to the UK in 2018 did not differ substantially from 2017, decreasing by 33,000, or less than a percent. The declines in total nights and total expenditure were more notable – by 2m nights (-7%) and £271m (-7%), respectively, from 2017.

The decline in US tourists was experienced more strongly in Scotland, where total visits decreased by 74,000 (-13%), and total nights dropped by over a million (-21%) in 2018. While the average spend per day remained unchanged at £112, the smaller number of visitors and their shorter average length of stay resulted in a total expenditure decrease of £118m (-21%). Two-thirds of all US visitors came to Scotland for a holiday. On a UK level, the proportion of holidaymakers was less than half, while business trips accounted for one out of five US visits.

Despite the significant decline in figures from 2017 levels, USA remained the largest source market for Scottish tourism in 2018, accounting for one-fifth of the total overseas spend.

**In 2018, USA was**

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
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<tbody>
<tr>
<td><strong>Largest</strong> source market measured by number of visits</td>
<td><strong>Largest</strong> international source market measured by number of visits</td>
</tr>
<tr>
<td><strong>Largest</strong> by number of nights</td>
<td><strong>Largest</strong> by number of nights</td>
</tr>
<tr>
<td><strong>Largest</strong> by expenditure</td>
<td><strong>Largest</strong> by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
US Visitors Heat Map
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

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

Darker areas = more visitors
Source: IPS, 2018.

American visitors to Scotland tend to stay longer and travel more within the country compared to the average overseas visitor. Out of Scotland’s top ten source markets measured by number of visits, USA ranks first in tourist regional spread in 2018; out of all international markets for the period between 2009 and 2018, it ranks fifth.

On average, each US visitor explored 1.80 Scottish regions during their stay in 2018. The total international average for the same period was 1.41 regions per visitor. Edinburgh and the Lothians remained the most frequented region in 2018 (350,000 visits). A slight increase in US visitors to the Highlands and Islands made it the second most popular region (154,000 visits), followed closely by Greater Glasgow and the Clyde Valley (152,000 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.
Visitors from the USA to Scotland

Historical Trend Information | 2009 - 2018

Following the peak in 2017, there was a decrease in the number of US visitors to Scotland in 2018. Despite that, the trend of growth over the past several years is evident, and 2018 visitor figures were second highest over the last decade. Total number of nights spent was below the 2017 (-21%) and 2016 (-5%) levels, but higher than any other year up to 2015. The same applies to total expenditure which declined by 21% compared to 2017 and 14% compared to 2016, but marked a 58% increase from 2013.

Inbound Tourism Volume and Value Trend, 2009-2018

![Graph showing the number of visitors and spend from 2009 to 2018]

Source: IPS.

Total Visits, Nights & Spend, 2009-2018

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>352</td>
<td>279</td>
<td>333</td>
<td>324</td>
<td>316</td>
<td>417</td>
<td>409</td>
<td>451</td>
<td>566</td>
<td>492</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>3,273</td>
<td>2,181</td>
<td>2,535</td>
<td>2,880</td>
<td>2,278</td>
<td>3,685</td>
<td>3,882</td>
<td>4,109</td>
<td>4,949</td>
<td>3,907</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>232</td>
<td>188</td>
<td>228</td>
<td>274</td>
<td>278</td>
<td>436</td>
<td>391</td>
<td>510</td>
<td>556</td>
<td>438</td>
</tr>
</tbody>
</table>

Source: IPS.
INSIGHT DEPARTMENT: USA FACTSHEET 2018

Average US Visit
Historical Trend Information | 2009 - 2018

Like the majority of international visitors to Scotland in 2018, US tourists stayed **one fewer night on average** compared to 2017. Average **daily spend remained unchanged** at £112 which resulted in a £92 decrease (-9%) in average spend per trip. Over the last six years, fluctuations in average daily expenditure do not exceed 10% up or down from 2018 levels which means that the amount of money the average US visitor spends during their trip is mainly determined by the number of nights they stay in Scotland. In 2018, US travellers to Scotland stayed one night more and spent **£266 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 from 2009 to 2018.](image)

**Source:** IPS.

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

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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Length of Stay (Nights)</strong></td>
<td>9.3</td>
<td>7.8</td>
<td>7.6</td>
<td>8.9</td>
<td>7.2</td>
<td>8.8</td>
<td>9.5</td>
<td>9.1</td>
<td>8.7</td>
<td>7.9</td>
</tr>
<tr>
<td><strong>Average Spend per Day (£)</strong></td>
<td>71</td>
<td>86</td>
<td>90</td>
<td>95</td>
<td>122</td>
<td>118</td>
<td>101</td>
<td>124</td>
<td>112</td>
<td>112</td>
</tr>
<tr>
<td><strong>Average Spend per Visit (£)</strong></td>
<td>660</td>
<td>673</td>
<td>685</td>
<td>846</td>
<td>879</td>
<td>1,047</td>
<td>956</td>
<td>1,131</td>
<td>982</td>
<td>890</td>
</tr>
</tbody>
</table>

**Source:** IPS.
Outbound Tourism
Visitors to the USA

Trips and Spend of UK and Scottish Residents in the USA, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total visits to the USA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>3,472,000</td>
<td>+2%</td>
</tr>
<tr>
<td>Scotland</td>
<td>328,000</td>
<td>+7%</td>
</tr>
<tr>
<td><strong>Total spend in the USA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£4,304,482,000</td>
<td>+1%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£391,861,000</td>
<td>+4%</td>
</tr>
<tr>
<td><strong>Average spend per visit</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£1,240</td>
<td>-1%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£1,195</td>
<td>-3%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

UK travellers to the USA increased by 71,000 (+2%) in 2018. Their total expenditure grew to a lesser extent, by £25m (+1%) from 2017. The UK remained USA’s third largest tourism source market measured by number of visitors, preceded only by Canada and Mexico.

The average UK resident spent 13.3 nights and £1,240 per trip while in USA which is hardly surprising considering the large distance between the two countries. Nearly two-thirds of the trips were undertaken by holidaymakers. One out of five UK travellers to the USA visited friends or relatives and 15% went on a business trip.

As a destination, USA amounted to 4.8% of the total UK outbound tourism in terms of visits and 9.5% in terms of expenditure in 2018. Its share of Scotland’s overseas tourism was even bigger, constituting 7.4% of all international trips undertaken by Scottish residents, and 12.9% of their total overseas spend.

In 2018, trips by Scottish residents to the USA grew by 21,000 (+7%) to reach 328,000. Total expenditure also increased, by £15m (+4%). This adds up to an average spend per visit of £1,195 in 2018, down £33 from 2017.

In 2018, USA was

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 4th most popular destination measured by number of visits</td>
<td>• 3rd most popular destination measured by number of visits</td>
</tr>
<tr>
<td>• 2nd by expenditure</td>
<td>• 2nd by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
How Visitors from the USA View Scotland

Scotland enjoys an image of a country with plenty of things to see and do where local people, food, drink and traditions are worth learning about. Research tells us that a holiday in Scotland may be perceived as a discriminating holiday and one which will reflect well on how a visitor from the USA wishes to be viewed by others (as educated and cultured).

In research in 2015, which explored the key benefits of a holiday in Scotland, the following key tangible and more emotional benefits of a holiday in Scotland stood out particularly strongly for USA consumers.

<table>
<thead>
<tr>
<th>Scenery and landscape</th>
<th>Consumers from the USA expect <strong>vast landscapes</strong> in Scotland that are (unlike the US) wild and not managed, and green not dry. They expect to be awed and inspired by the beauty and majesty of mountains and lochs. They expect the scenery to be <strong>breath-taking and dramatic</strong>, and they expect a variety of both rural and urban scenery.</th>
</tr>
</thead>
<tbody>
<tr>
<td>History and Culture</td>
<td>Scotland’s history and culture is viewed very positively. Being able to <strong>see castles</strong> is of particular importance and seen as a key benefit of a holiday here. They expect to feel an ever present sense of history when here and imagine that they will experience or even ‘<strong>feel the mysteries of the past via legends, myths and romantic stories</strong>’. And this is a perceived benefit which makes Scotland stand out.</td>
</tr>
<tr>
<td>People</td>
<td>They expect a sense of <strong>welcome and inclusion</strong> when on holiday in Scotland. This contrasts to a feeling that visitors from USA may not be as welcome in other locations abroad. They expect interactions with friendly, warm and hospitable people in Scotland to really enhance their holiday experience</td>
</tr>
<tr>
<td>A sense of connection</td>
<td>Digging deeper, consumers from America told us that they expect to feel a spiritual connection to the land, and to history and an authentic feeling of <strong>connection to the Scottish people</strong>. They told us they expect to ‘<strong>feel at home</strong>’ when on holiday in Scotland and to be moved at some level from their experiences. They expect to feel a cosy feeling from a small welcoming country. They expect a holiday in Scotland to be the opposite of superficial.</td>
</tr>
</tbody>
</table>

Source: VisitScotland Research 2014-2017
MOTIVATIONS TO VISIT SCOTLAND

- History & culture 56% (survey average 33%)
- Scenery & landscape 55% (survey average 50%)
- Always wanted to visit 41% (survey average 15%)
- My Scottish ancestry 24% (survey average 9%)
- To visit cities 21% (survey average 15%)

Scotland’s history & culture is a stronger motivator for visitors from the USA in comparison to domestic or European markets. Film and TV programmes about Scotland are also important prompts to visits for visitors from USA, especially Outlander. Ancestral links may prompt some visitors from USA to go ‘off the beaten track’. For those on a specific ancestral visit, sightseeing, researching ancestry and ‘walking in their steps’ are key elements of a trip.

CONNECTIONS TO SCOTLAND

58% of visitors from USA had a connection to Scotland. The most common connections were:

- Ancestors lived in Scotland 33%
- Friends live in Scotland 12%
- Family live in Scotland 12%

Visitors from the USA are more likely to have a connection with Scotland than European counterparts but less so than visitors from Canada or Australia who typically have greater family & friend connections.

PLANNING & BOOKING

On average, visitors from USA start to plan 10 months in advance.

Planning: 40.9 weeks
Travel booking: 21.7 weeks
Accommodation booking: 21.6 weeks

Visitors from USA are likely to use many types of information in planning their holiday, particularly websites, their friends and family and printed travel guide books. They are also more likely than average to seek personal advice from a travel agent.

TRANSPORT TO SCOTLAND

47% arrived by plane (indirect). The most popular airports for connections to Scotland were:
Heathrow 34%
Dublin 21%
Schiphol 9%

40% arrived by plane, directly into Scotland:
Edinburgh Airport 54%
Glasgow Airport 27%
Aberdeen Airport 4%

Source: Scotland Visitor Survey 2015/2016
TOP 5 ACTIVITIES IN SCOTLAND

- Visited castle/historic house: 92%
- Sightseeing: 90%
- Visited cathedral, church: 85%
- Visited cities: 72%
- Short walks: 70%

Typically visitors from the USA are very active during their break in Scotland, above average on most activities but with a particular emphasis on historical and cultural attractions.

Further down the list of activities, but notably higher for visitors from the USA than others:

- Visiting a film or TV location: 18%

Source: Scotland Visitor Survey 2015/2016

ACCOMMODATION

Accommodation Preferences:
- Hotel 62% (survey average 41%)
- B&B/GH 38% (survey average 20%)
- Friends/family 23% (survey average 19%)
- Self-catering 12% (survey average 22%)
- Airbnb 14% (survey average 5%)

Aspects Important in Choosing Accommodation:
- Location: 79%
- Value for Money: 59%
- Availability of free Wi-Fi at accommodation: 45%
- Quality star grading: 33%
Visitors from USA record very high levels of satisfaction across all aspects of the visitor experience in Scotland and these ratings tend to be higher than all other markets.

### Satisfaction with the Visitor Experience

<table>
<thead>
<tr>
<th></th>
<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>9.4</td>
<td>88% (above average)</td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>9.5</td>
<td>89% (above average)</td>
</tr>
</tbody>
</table>

70% strongly agree that ‘Scotland is a country worth visiting more than once’

45% strongly agree that ‘this is one of the best holidays I have ever taken’

62% strongly agree that ‘they were made to feel welcome’

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

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

Source: Scotland Visitor Survey 2015/2016
Popular media channels

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

### Key Websites Used
- Facebook
- Google
- Yahoo
- Msn
- Amazon
- Email (gmail, Hotmail)
- Aol
- CNN
- BBC news
- Twitter
- New York Times
- Pinterest
- Huffington Post

### Key Social Media Accounts
- Facebook
- YouTube
- TripAdvisor
- Google+
- Pinterest
- Linkedin
- Instagram
- Twitter
- Whatsapp
- Snapchat

### Key Newspapers Read (online or print)
- New York Times
- Washington Post
- Wall Street Journal
- Huffington Post
- Boston Globe
- LA Times
- Chicago Tribune

### Key Magazines Read (Online or in print)
- National Geographic
- Time
- People
- New Yorker
- Southern Living

### Influential TV Programmes for Travel
- Outlander
- Rick Steeves
- Downton abbey
- Braveheart
- Travel Channel
- National Geographic

Source: VisitScotland Research 2014-2017
Barriers to Travel

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

- The biggest barrier to consideration of Scotland is awareness. Locations closer to home are often more top of mind for the traveller from the USA.
- Cost is a critical factor in choosing a holiday destination and there may also be a perception that Scotland is an expensive travel choice.
- A lack of knowledge of multiplicity of locales and range of activities to do in the evening may also hinder consideration.
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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