Introduction
Background Information and Aim

This report provides a summary of statistics on tourism in Scotland’s Argyll and the Isles region (Argyll and Bute council area). It gathers information from a suite of tourism monitors managed by VisitScotland’s Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.

- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website. **Please note:** In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.

- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visits resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.

- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland’s tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution. To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors’ region of residence, purpose of travel, or seasonality of trips. Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Most international and domestic figures refer to the Argyll and Bute local authority. However, some international figures are only available at a wider regional level. For this reason, the “Duration of stay” and “Seasonality” charts on page 6 are based on data for the “Loch Lomond, Stirling, Trossachs and Argyll” region including the following local authorities: Argyll and Bute, Clackmannanshire, Falkirk and Stirling. Accommodation occupancy rates on page 5 also refer to this wider region.

This report starts with an **overall** evaluation of Argyll and the Isles tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

**Sources**

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- MoffatCentre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018
I. Overall Tourism in Argyll & the Isles

Latest Figures

Overall Tourism Summary:
Visits, Nights and Spend in Argyll & the Isles, 2017-2019 Annual Average Figures

<table>
<thead>
<tr>
<th>VISITS BREAKDOWN</th>
<th>Visits</th>
<th>Nights</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017-19 Average (000s)</td>
<td>% Change 2016-18/2017-19</td>
<td>2017-19 Average (000s)</td>
</tr>
<tr>
<td>Europe</td>
<td>81</td>
<td>-7%</td>
<td>307</td>
</tr>
<tr>
<td>North America</td>
<td>39</td>
<td>0%</td>
<td>129</td>
</tr>
<tr>
<td>Rest of World</td>
<td>27</td>
<td>+28%</td>
<td>112</td>
</tr>
<tr>
<td><strong>Total International Overnight</strong></td>
<td><strong>147</strong></td>
<td><strong>0%</strong></td>
<td><strong>548</strong></td>
</tr>
<tr>
<td>Scotland</td>
<td>491</td>
<td>+24%</td>
<td>1,626</td>
</tr>
<tr>
<td>Rest of Great Britain</td>
<td>355</td>
<td>+10%</td>
<td>1,784</td>
</tr>
<tr>
<td><strong>Total Domestic Overnight</strong></td>
<td><strong>846</strong></td>
<td><strong>+18%</strong></td>
<td><strong>3,411</strong></td>
</tr>
<tr>
<td><strong>Total Overnight Tourism</strong></td>
<td><strong>993</strong></td>
<td><strong>+15%</strong></td>
<td><strong>3,959</strong></td>
</tr>
<tr>
<td><strong>Total Day Tourism</strong></td>
<td><strong>5,538</strong></td>
<td><strong>+14%</strong></td>
<td><strong>N/A</strong></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>6,531</strong></td>
<td><strong>+14%</strong></td>
<td><strong>3,959</strong></td>
</tr>
</tbody>
</table>

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.
National figures are available in the Key Facts on Tourism in Scotland 2019 report published on visitscotland.org.
Visitors to Argyll & the Isles
Tourism Performance | 2019

In 2019, Argyll and the Isles witnessed notable growth in overnight tourism. Both domestic and international visitors increased in numbers which resulted in even bigger rises in nights and expenditure.

Between 2017 and 2019, overnight trips to Argyll and the Isles were just under a million per year on average, a 15% increase from 2016-2018. Similarly to other Scottish regions, this rise was driven by domestic travellers, particularly residents of Scotland. At four million and £261 million per year, respectively, bednights and overnight tourism expenditure grew by a fifth from their 2016-2018 levels.

There were no big changes in Argyll and the Isles’ visitor mix in 2017-2019. Scottish residents accounted for roughly half of all overnight trips and a third of the total overnight spend. English and Welsh travellers also continued to be vital for tourism in the region. While they did not make as many trips to Argyll and the Isles as Scottish travellers, they spent more time and money in the region.

Europeans form the majority of international travellers to Argyll and the Isles. Despite declining by 7% in 2017-2019, they accounted for more than half of all overseas bednights and spend in the region. Number of trips by North American residents remained unchanged from 2016-2018.

Figures indicate a very significant increase in domestic day tourism spend in Argyll and the Isles, which reached £182 million per year on average in 2017-2019.

Sources: GBTS/IPS, 2017-19.
Regional Tourism Performance

Local Statistics

Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

<table>
<thead>
<tr>
<th>Local Authority</th>
<th>Units Number</th>
<th>% Change 2017/18</th>
<th>Employment (000s)</th>
<th>% Change 2017/18</th>
<th>GVA (£m)</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argyll and Bute</td>
<td>611</td>
<td>+2%</td>
<td>5.7</td>
<td>+4%</td>
<td>114.8</td>
<td>+9%</td>
</tr>
</tbody>
</table>

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit [visitscotland.org](http://visitscotland.org). *The Scottish Government defines sustainable tourism as a growth sector including a number of business types detailed on their website. Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Argyll & the Isles (with Visitor Numbers), 2019

- Argyll Forest Park – 151,538
- Staffa National Nature Reserve – 107,725
- Oban War and Peace Museum – 33,310
- Iona – 29,808
- Aros Park – 19,710
- Inveraray Castle – 125,462
- Iona Abbey & St Columba Centre (Mull) – 63,884
- Oban Distillery Visitor Centre – 57,031
- Benmore Botanic Garden – 53,318
- Mount Stuart – 42,809

Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.
VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact [info@moffatcentre.com](mailto:info@moffatcentre.com).

Occupancy Rates by Accommodation Type and Month, Argyll & the Isles and Forth Valley 2019

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (Room Occ.)</td>
<td>62%</td>
<td>64%</td>
<td>67%</td>
<td>76%</td>
<td>83%</td>
<td>87%</td>
<td>83%</td>
<td>87%</td>
<td>82%</td>
<td>77%</td>
<td>62%</td>
<td>61%</td>
<td>74%</td>
</tr>
<tr>
<td>Guest House/B&amp;B (Room Occ.)</td>
<td>37%</td>
<td>48%</td>
<td>34%</td>
<td>45%</td>
<td>72%</td>
<td>70%</td>
<td>74%</td>
<td>86%</td>
<td>69%</td>
<td>46%</td>
<td>38%</td>
<td>17%</td>
<td>52%</td>
</tr>
<tr>
<td>Self-Catering (Unit Occ.)</td>
<td>43%</td>
<td>50%</td>
<td>54%</td>
<td>55%</td>
<td>63%</td>
<td>63%</td>
<td>67%</td>
<td>71%</td>
<td>59%</td>
<td>53%</td>
<td>35%</td>
<td>40%</td>
<td>54%</td>
</tr>
<tr>
<td>Hostel (Bed Occ.)</td>
<td>16%</td>
<td>31%</td>
<td>32%</td>
<td>56%</td>
<td>66%</td>
<td>60%</td>
<td>67%</td>
<td>72%</td>
<td>60%</td>
<td>43%</td>
<td>26%</td>
<td>27%</td>
<td>50%</td>
</tr>
</tbody>
</table>

II. International Visitors to Argyll & the Isles

Overnight Tourism

Visitor statistics indicate a **great rise in international tourism** to Argyll and the Isles in 2019, particularly in terms of **bednights** and **expenditure**. At 150,000, number of overseas trips grew by a fifth from 2018. Figures suggest international travellers spent nearly 700,000 nights and £90 million in Argyll and the Isles in 2019 driven by a big **increase in holiday travel, stay and spend** in the region. As a result of this growth, Argyll and the Isles accounted for 4.3% of all international trips and 3.5% of the total overseas spend in Scotland in 2019. Between 2017 and 2019, more than half of all overseas trips to the region were made by residents of the USA, Germany, Netherlands and Australia.

### National and Regional International Tourism Performance, 2019

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Scotland</th>
<th>Argyll &amp; the Isles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Key Facts in 2019</td>
<td>% Change 2018/19</td>
</tr>
<tr>
<td>Visits (000s)</td>
<td>3,460</td>
<td>-7%</td>
</tr>
<tr>
<td>Spend (£M)</td>
<td>2,538</td>
<td>+7%</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>27,385</td>
<td>+8%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>7.9 nights</td>
<td>+16%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£93</td>
<td>0%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£734</td>
<td>+15%</td>
</tr>
</tbody>
</table>

Source: IPS, 2019.

### Duration of Stay*

- 1-3 nights (6%)
- 4-7 nights (27%)
- 8-14 nights (47%)
- 15+ nights (19%)

### Purpose of Travel

- Business (2%)
- Holiday (83%)
- VFR** (14%)
- Other (<1%)

### Seasonality*

- Jan-Mar (6%)
- Apr-Jun (33%)
- Jul-Sep (46%)
- Oct-Dec (16%)

### Top 5 Overseas Markets

- USA: 21%
- Germany: 17%
- Netherlands: 9%
- Australia: 7%
- Italy: 5%

Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding. *Duration of stay and seasonality data refers to the wider Loch Lomond, Stirling, Trossachs and Argyll region (including Argyll and Bute, Clackmannanshire, Falkirk and Stirling). **VFR = Visiting friends or relatives.
III. Domestic Visitors to Argyll & the Isles
Overnight Tourism

The strong performance of tourism in Argyll and the Isles in 2019 was also observed among domestic visitors. British residents undertook more than a million overnight trips to the region which marked a 41% increase from 2018. Bednights rose by nearly a half to 4.2 million, while tourism expenditure grew by two-thirds to reach £240 million. These figures represent 7.3% of the domestic overnight visits and 7.5% of the associated spend nationally in 2019. Domestic overnight travel increased across all travel purposes and all seasons, except for the first quarter of the year. Between 2017 and 2019, seven in ten British trips to Argyll and the Isles occurred between April and September.

### Domestic Overnight Tourism, 2019

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Scotland</th>
<th>Argyll &amp; the Isles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Key Facts in 2019</td>
<td>% Change 2018/19</td>
</tr>
<tr>
<td>Visits (000s)</td>
<td>13,810</td>
<td>+17%</td>
</tr>
<tr>
<td>Spend (£M)</td>
<td>3,200</td>
<td>+16%</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>46,413</td>
<td>+15%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>3.4 nights</td>
<td>-2%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£69</td>
<td>+1%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£232</td>
<td>-1%</td>
</tr>
</tbody>
</table>


### Duration of Stay

- 1-3 nights (49%)
- 4-7 nights (37%)
- 8-14 nights (14%)

### Purpose of Travel

- Business (10%)
- Holiday (70%)
- VFR (18%)
- Other (2%)

### Seasonality

- Jan-Mar (13%)
- Apr-Jun (36%)
- Jul-Sep (34%)
- Oct-Dec (16%)

### Visitors’ Age

- 16-24 (8%)
- 25-34 (15%)
- 35-44 (16%)
- 45-54 (21%)
- 55-64 (14%)
- 65+ (26%)

Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Argyll & the Isles. Figures may not sum up due to rounding.
Domestic Day Visits to Argyll & the Isles
Tourism Performance and Activities

### National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

<table>
<thead>
<tr>
<th>Region</th>
<th>Visits</th>
<th>% Change 2016-18/2017-19</th>
<th>Spend</th>
<th>% Change 2016-18/2017-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>140.8</td>
<td>-2%</td>
<td>5,749</td>
<td>+5%</td>
</tr>
<tr>
<td>Argyll &amp; the Isles</td>
<td>5.5</td>
<td>+14%</td>
<td>182</td>
<td>+90%</td>
</tr>
</tbody>
</table>

Source: GBDVS.

### Most Popular Activities Undertaken as Part of a Day Trip, Argyll & the Isles: 2016-18 Average Annual Figures (Number of Day Trips in Millions)

- Went for a meal in a restaurant, café, hotel, pub, etc.: 0.7
- Short walk/stroll – up to 2 miles/1 hour: 0.6
- Sightseeing on foot: 0.6
- Long walk, hike or ramble (minimum of 2 miles/1 hour): 0.6
- Sightseeing by car: 0.6
- Visited family for leisure: 0.5
- Visited a garden: 0.5
- Watched wildlife, bird watching: 0.4
- Visited a castle/other historic site: 0.4
- Went for a snack in a fast food outlet, takeaway, etc.: 0.4

Source: GBDVS.
Visitors to Argyll & the Isles
Historical Trend Information | 2013 - 2019

In 2019, total overnight trips and spend in Argyll and the Isles were the highest in seven years. Annual tourism performance in the region is predominantly driven by domestic travel which exhibits much higher annual fluctuations than international travel. In 2019, domestic overnight trips and tourism expenditure were respectively 41% and 43% above their annual average levels for the 2016-2018 period. Up until 2019, international tourism to Argyll and the Isles appeared to be much more predictable, with number of trips typically totalling about 150,000 per year. International spend in 2019 was a record-high, partially due to large increases in bednights and therefore average length of stay.

Domestic and International Overnight Tourism, 2013-2019

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic (000s)</td>
<td>801</td>
<td>902</td>
<td>971</td>
<td>629</td>
<td>802</td>
<td>722</td>
<td>1,015</td>
</tr>
<tr>
<td>International (000s)</td>
<td>120</td>
<td>157</td>
<td>145</td>
<td>150</td>
<td>165</td>
<td>126</td>
<td>150</td>
</tr>
<tr>
<td>Total Overnight (000s)</td>
<td>921</td>
<td>1,059</td>
<td>1,116</td>
<td>779</td>
<td>967</td>
<td>848</td>
<td>1,165</td>
</tr>
</tbody>
</table>

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic (£m)</td>
<td>185</td>
<td>224</td>
<td>263</td>
<td>145</td>
<td>215</td>
<td>142</td>
<td>240</td>
</tr>
<tr>
<td>International (£m)</td>
<td>48</td>
<td>46</td>
<td>46</td>
<td>56</td>
<td>56</td>
<td>40</td>
<td>90</td>
</tr>
<tr>
<td>Total Overnight (£m)</td>
<td>233</td>
<td>270</td>
<td>309</td>
<td>201</td>
<td>271</td>
<td>182</td>
<td>330</td>
</tr>
</tbody>
</table>

Sources: GBTS, IPS.
Appendix

USING AND INTERPRETING STATISTICAL DATA
Sources: Data is sourced from the Office for National Statistics’ International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre’s Scottish Visitor Attraction Monitor (VAM) and ONS’ Scottish Annual Business Survey (SABS).

SAMPLE SIZES
Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller 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: Puck’s Glen
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Published: January 2021