



Insight Department:
Scotland's Tourism Performance
Quarter 1 / 2020

27 July 2020

Scottish Tourism Industry - Q1 202 at a Glance

International Visitors

Total International Visitor Spend	£204m	▼	-3%
European Visitor Spend	£79m	▼	-17%
North American Visitor Spend	£25m	▼	-51%
Rest-of-world Visitor Spend	£99m	▲	+55%
Total International Visitor Trips	367Th	▼	-17%
European Visitor Trips	215Th	▼	-19%
North American Visitor Trips	50Th	▼	-25%
Rest-of-world Visitor Trips	103Th	▼	-7%
International Spend Per Trip	£556	▲	+17%

Accommodation Occupancy

Hotel (Room)	49%	▼	-7.5	percentage points
Guest House/ B&B (Room)	19%	▼	-8	percentage points
Self-Catering (Unit)	23%	▼	-12	percentage points
Hostel (Bed)	31%	▼	-6	percentage points
Touring Caravan & Camping (Pitch)	12%	▼	-7	percentage points

Important Methodology Note

International Statistics:

Data collection for the International Passenger Survey was suspended on 16 March 2020 because of the coronavirus (COVID-19). For this reason, National Statistics status has been suspended for the March results. Results for January and February are unaffected.

Domestic Statistics:

There will be a temporary gap in the monthly reporting of the Great Britain Tourism Survey (Domestic Overnight and Day Visit Tourism Statistics) from January 2020 to June 2020 as we transition over to a new data supplier and disruption due to COVID-19. Data collection started from July 2020. We estimate the normal cycle of reporting will resume in Q4 2020.

Tourism Statistics 2020

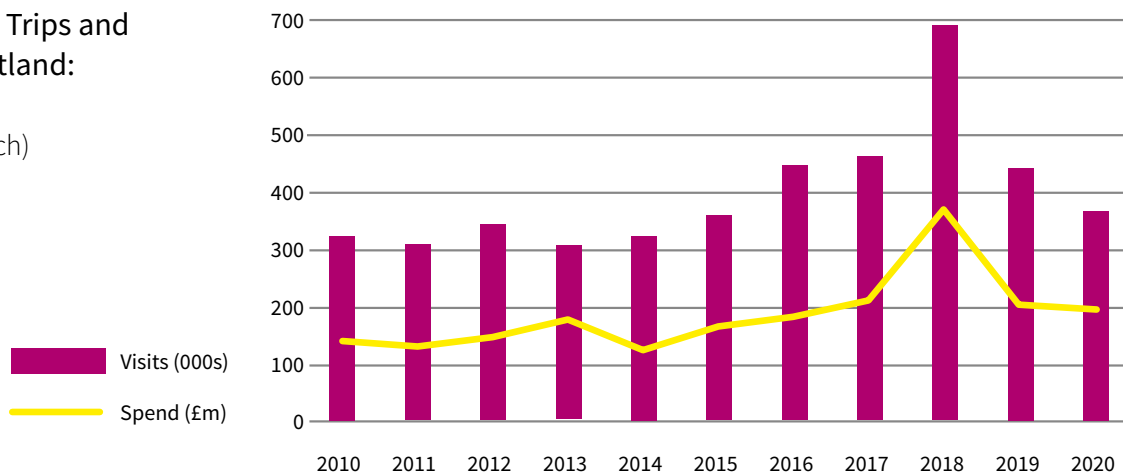
International Tourism: Visitor Volume and Value to Scotland Q1 2020

Visitors' Region of Residence	Trips			Spend		
	Q1 2019 (000's)	Q1 2020 (000's)	% Change	Q1 2019 (£m)	Q1 2020 (£m)	% Change
Total International	443	367	-17%	210	204	-3%
North America	67	50	-25%	51	25	-51%
Europe	265	215	-19%	95	79	-17%
-of which EU	243	191	-21%	84	66	-21%
-of which EU15	212	154	-27%	76	58	-24%
-of which EU Other	32	37	+16%	8	8	0%
Rest of World	111	103	-7%	64	99	+55%

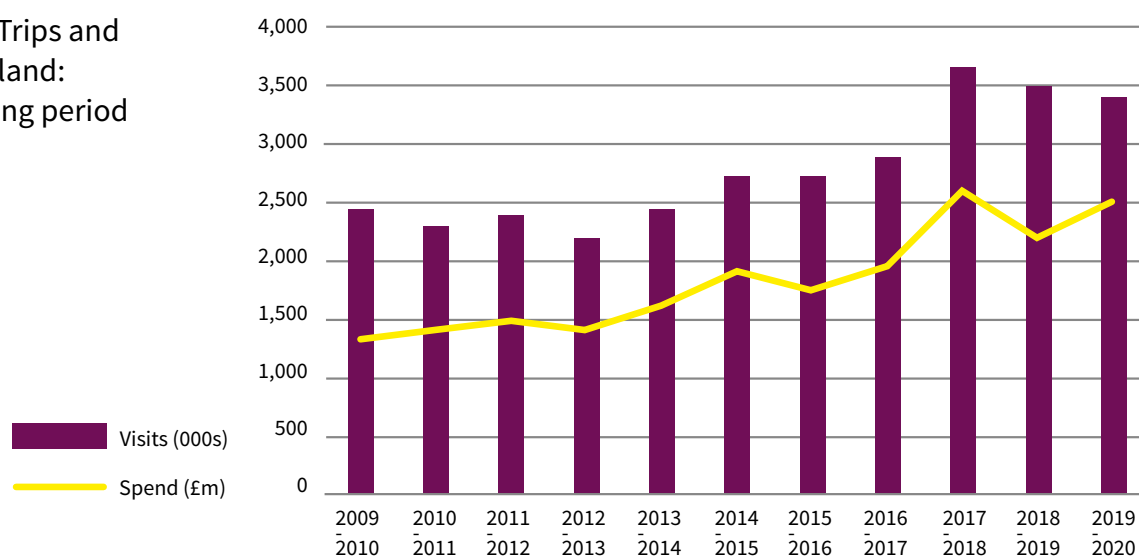
International Tourism: Visitor Volume and Value to Scotland Q2 2019-Q1 2020 (Rolling 12 Months)

Visitors' Region of Residence	Trips			Spend		
	Q2 2018- Q1 2019 (000's)	Q2 2019- Q1 2020 (000's)	% Change	Q2 2018- Q1 2019 (£m)	Q2 2019- Q1 2020 (£m)	% Change
Total International	3,483	3,384	-3%	2,223	2,533	+14%
North America	709	744	5%	635	784	23%
Europe	1,927	1,750	9%	916	963	5%
-of which EU	1,705	1,535	-10%	816	813	0%
-of which EU15	1,552	1,332	-14%	770	733	-5%
-of which EU Other	153	203	33%	46	80	74%
Rest of World	847	890	5%	672	786	17%

International Trips and Spend in Scotland: Quarter 1 (January - March)



International Trips and Spend in Scotland: 12 month rolling period (March-April)



Interpretation of Tourism Performance During Q1/2020 and During Q2/2019-Q1/2020

International overnight tourism visits to Scotland decreased by 17% in the first quarter of the year, falling from 443,000 in Q1/2019 to 367,000 in Q1-2020. This was mostly due to a drop in inbound trips from EU15 residents (58,000 less, or -27%), and to a lesser extent for North American residents (17,000, or -25% from Q1 2019). Visitors from other European countries increased by 15% while travellers to Scotland from other parts of the world decreased more moderately by 7% in Q1/2020. The decline in international visits was much less considerable in the context of the 12-month rolling period, where April 2019-March 2020 figures were 3% below April 2018-March 2019.

The drop in the number of international trips resulted in an associated, albeit much less significant, decline in

international spend in Q1/2020. While visits decreased by a sixth from their Q1/2019 levels, overseas tourism expenditure was only 3% below its Q1/2019 value at £204 million. This was result of a big increase in average spend per visit (+17%) which was mostly driven by non-American long-haul visitors. Looking at the 12-month rolling period, spend was 14% up from April 2018-March 2019.

While the number of overseas trips in Q1/2020 was the lowest since Q1/2015, tourism expenditure remained in line with Q1 expenditure in the past several years (2018 peak aside). The 12-month rolling period figures indicate that visits have decreased for a second year in a row but remain well above the pre-2017/18 period. International spend in April 2019/March 2020 was second-highest of all April-March period in the last decade.

CONTACT US

Insight Department
VisitScotland
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH

0131 472 2222

July 2020

visitscotland.com visitscotland.org

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