



UNITED KINGDOM MARKET PROFILE

The UK is a priority market as it represents 77% visitors to Scotland and 56% spend (GBTS & NISRA 2018). UK visitors have a tendency to travel more widely across Scotland and offer the best potential for repeat visits and for travel out with the main season

VISITS IN 2018 (UK)

12M

VALUE
£2,863M

£238 AVERAGE SPEND
PER VISIT

DAY VISITS IN 2018 (GB) (85% SCOTS RESIDENTS)

138M

VALUE
£5,474M

Source: GBTS & NISRA 2018

FLIGHTS (UK)

Belfast	●●	Jersey	●●
Birmingham	●●	London	●●●●●●
Bristol	●●	Londonderry	●●
Durham Tees Valley	●●	Manchester	●●●●
East Midlands	●●	Norwich	●●
Exeter	●●	Newcastle	●●
Guernsey	●●	Newquay	●●
Humberside	●●	Southampton	●●
Isle of Man	●●		

AIRLINE

- British Airways ● EasyJet ● Flybe ● Loganair ● Ryanair

TRAINS (GB)

LNER, Caledonian Sleeper, CrossCountry trains, First Trenitalia, Transpennine Express and ScotRail



FERRIES (UK)

Larne to Cairnryan (P&O). Belfast to Cairnryan (Stena Line)



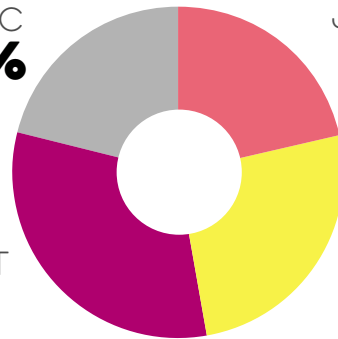
SEASONALITY OF TRIP (GB)

OCT-DEC
20.9%

JAN-MAR
21.5%

JUL-SEPT
31.7%

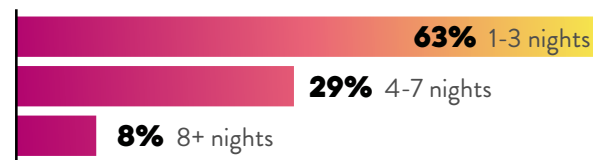
APR-JUN
25.9%



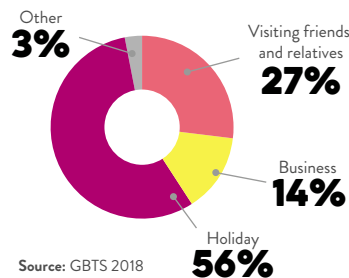
Source: GBTS 2018



DURATION OF STAY (GB) HOLIDAY PURPOSE ONLY



PURPOSE OF TRAVEL (GB)



Source: GBTS 2018

TOP DRIVERS OR MOTIVATORS (UK)

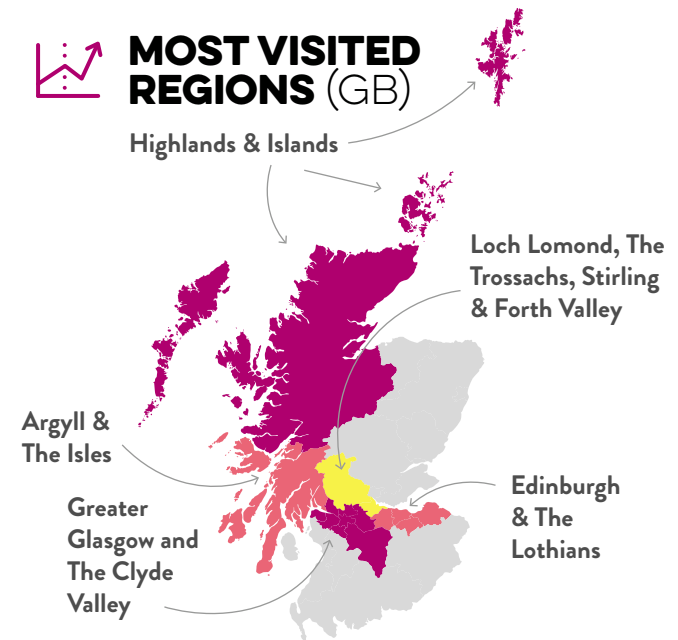
- ▶ Scenery & Landscapes
- ▶ Holidayed before and wanted to return
- ▶ History & Culture

TOP ACTIVITIES (UK)

Sightseeing by car, coach, and on foot. Visiting historic houses, Stately homes, Castles. Short walks and strolls



MOST VISITED REGIONS (GB)

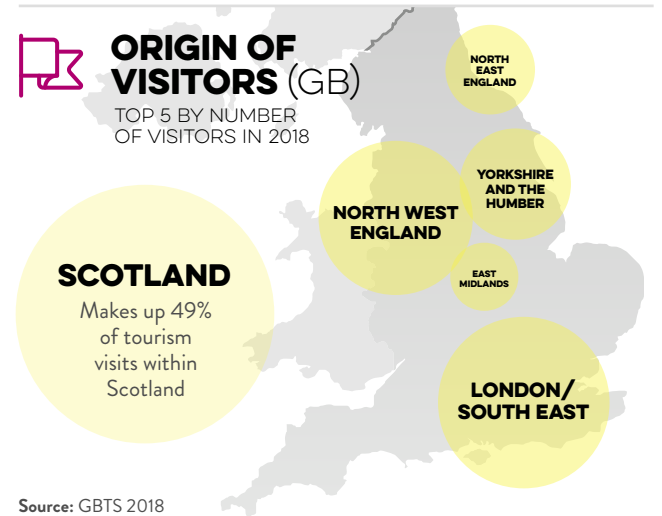


Source: GBTS 2018



ORIGIN OF VISITORS (GB)

TOP 5 BY NUMBER OF VISITORS IN 2018



Source: GBTS 2018

PLANNING & BOOKING TIMELINE (UK)



Source: Visitor Survey 2015/16

Source: Visitor Survey 15/16



PRIORITY SEGMENTS (UK)

Primary: Curious Travellers, Food Loving Culturalists, Engaged Sightseers, Adventure Seekers.

Secondary: Natural Advocates

CUSTOMER JOURNEY

Everyone has a bank of holiday hopes and ideas in their heads that bubble away, constantly being added to over time. It's almost like a holiday soup. When it comes to planning a holiday people take an idea from this soup and do some basic research to see if it's feasible.

If the idea doesn't suit, it goes back into the soup and they try another. Within this process, four main patterns of planning behaviour can be identified and these are what we are using to inform our website: visitscotland.com

