In 2018, the USA was Scotland’s largest international visitor market by number of visits, number of nights and by visitor spend.

**VISITS IN 2018**

492,000

**VALUE**

£438m

**AVERAGE SPEND PER VISIT**

£890

**FLIGHTS**

- JFK
- Boston
- Newark
- Chicago
- Washington D.C
- Philadelphia
- JFK
- Newark
- Orlando

**AIRLINE**

- Delta
- United
- American
- Virgin

**SEASONALITY OF TRIP**

- OCT-DEC: 16%
- JUL-SEPT: 42%
- APR-JUN: 35%
- JAN-MAR: 7%

**DURATION OF STAY**

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

**PURPOSE OF TRAVEL**

- Visiting friends and relatives: 22%
- Business: 9%
- Holiday: 67%
- Other: 3%

**TOP DRIVERS OR MOTIVATORS**

- History & Culture
- Scenery & Landscapes
- My Scottish Ancestry
- “Always wanted to visit”

**TOP ACTIVITIES**

Visiting cathedrals and churches, castles/historic houses, sightseeing, cities

**ORIGIN OF VISITORS (TOP 6)**

- California
- Texas
- New York
- Illinois
- Florida
- California

**TOP VISITED REGIONS**

- Highlands & Islands
- Greater Glasgow & Clyde Valley
- Edinburgh & The Lothians

**PLANNING & BOOKING TIMELINE**

- Planning lead time: 3 to 6 months
- Booking lead time: 2 to 4 months

**PRIORITY SEGMENTS**

- Sightseers
- Explorers
- Buzzseekers

As per VisitBritain research
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

**IDEA ACCUMULATION**
- Media & cultural influences
  - Hearing about / looking at the holidays of friends and family

**CONCEPT FORMING**
- Going through available options and considering which best meet holiday needs
  - Weighing up the feasibility and envisioning the trip

**CONCEPT BUILDING**
- Deciding whether to go ahead and book it, or leave it for another year
  - Forming a whole picture of the desired trip

**EXECUTING THE PLAN**
- Building the holiday
  - Book travel, accommodation and some activities that require pre-booking
  - First stages of planning: taking time off, arranging pet care etc

**THE HOLIDAY**
- Research attractions, activities and restaurants
- Share photos and “check ins” on social media
- Leave reviews

**MARKETING ACTIVITY**
- VisitScotland paid media and PR
- VisitScotland email activity
- VisitScotland social channels
- VisitScotland and partner paid media and PR
- VisitScotland influencer / community activity
- VisitScotland paid search and SEO
- Intermediary inspiration activity

- VisitScotland emails
- VisitScotland social channels