



UNITED STATES MARKET PROFILE

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

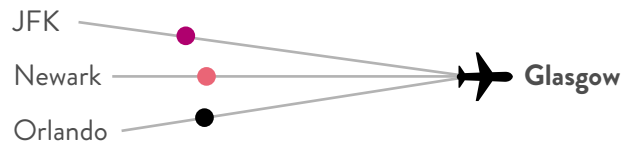
£438M

AVERAGE SPEND PER VISIT

£890

Source: IPS 2018

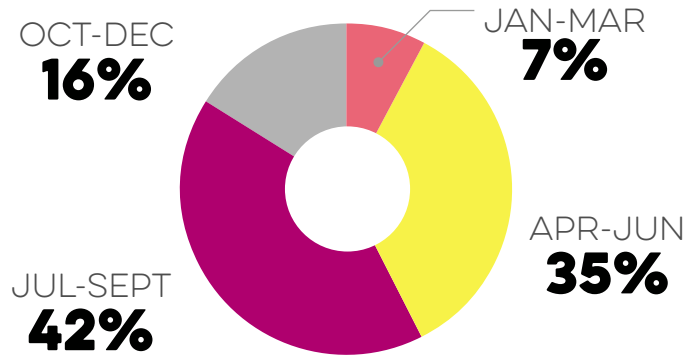
FLIGHTS



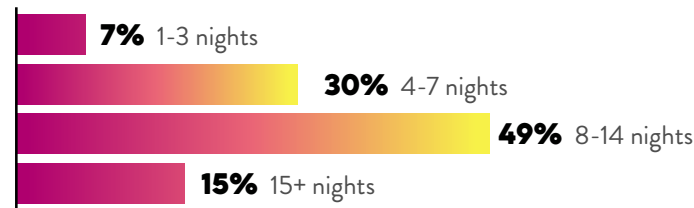
AIRLINE

● Delta ● United ● American ● Virgin

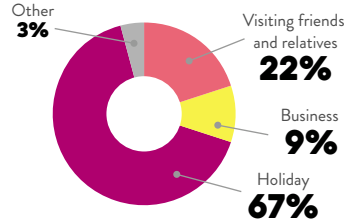
SEASONALITY OF TRIP



DURATION OF STAY



PURPOSE OF TRAVEL



Source: Charts based on 3 year average IPS 2016-18

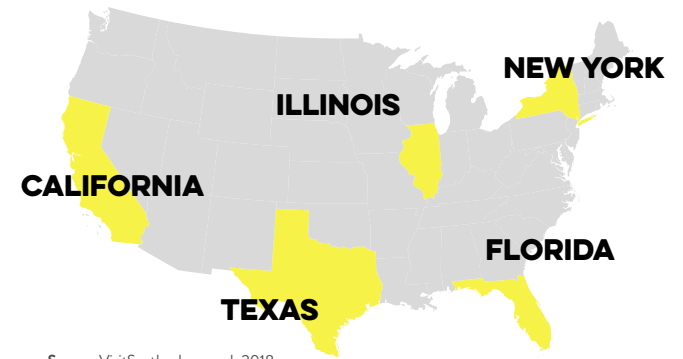
TOP DRIVERS OR MOTIVATORS

- ▶ History & Culture
- ▶ Scenery & Landscapes
- ▶ My Scottish Ancestry
- ▶ "Always wanted to visit"

TOP ACTIVITIES

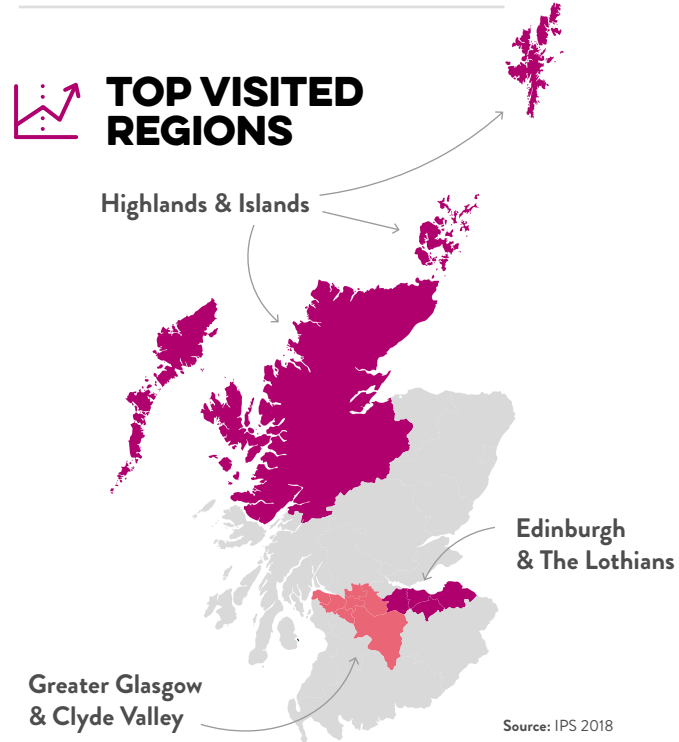
Visiting cathedrals and churches, castles/historic houses, sightseeing, cities
Source: Scotland Visitor Survey 2015/16

ORIGIN OF VISITORS (TOP 5)



Source: VisitScotland research 2018

TOP VISITED REGIONS



Source: IPS 2018

PLANNING & BOOKING TIMELINE



Source: Scotland Visitor Survey 2015/16

PRIORITY SEGMENTS

Sightseers
Explorers
Buzzseekers

As per VisitBritain research

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

