

Introduction

Please note that, due to changes in the ONS International Passenger Survey (IPS) and the United Kingdom Tourism Survey (UKTS), statistics from 2005 onwards are not comparable with previous years.

	Trips 2008 (m)	Nights 2008 (m)	Spend 2008 (£m)
Scotland	5.84	19.19	927
England	5.74	23.14	1,682
Northern Ireland	0.36	1.16	127
Wales	0.21	0.70	76
Total UK Tourism	12.15	44.19	2,812
Total Overseas Tourism	2.48	19.34	1,235
Total	14.63	63.53	4,047

In 2008, around 15 million tourists took overnight trips to Scotland. The annual spend was over £4.0 billion. Scottish Tourism contributes 11% of the Scottish service sector economy compared to 9% for the UK as a whole.

- The UK accounts for 83% of tourism trips to Scotland.
- Overseas tourism accounts for 17% of tourism trips to Scotland.
- 65% of overseas trips are taken in April-September.
- The European Union is our biggest overseas market with six of the top ten inbound markets sharing the single European Currency.
- The USA remains the biggest single national markets with 21% of overseas spend.
- 75% of overseas visitors who come to Scotland arrive in the UK by air and 66% of UK visitors come by car.
- Overseas tourists stay an average of 7.8 nights, Scottish tourists an average of 3.3 nights and English tourists an average of 4.0 nights.
- Average spend per night is £64 for overseas tourists, £73 for English tourists and £48 for Scottish tourists.
- Scottish weather for 2008 recorded rainfall 14% higher than the 1971-2000 average and there was 9% higher rainfall than 2007.

1 Volume and Value of Tourism in Scotland

	Trips		Nights		Spend	
	(m)	(%)	(m)	(%)	(£m)	(%)
UK Tourists 2008						
Holidays	8.29	68	33.54	76	1,986	71
Business	1.93	16	5.14	12	557	20
Visits to Friends & Relatives	1.60	13	4.16	9	208	7
Other	0.33	3	1.35	3	61	2
Total	12.15	100	44.19	100	2,812	100
Overseas Tourists 2008						
Holidays	1.16	47	7.70	40	640	52
Business	0.39	16	1.78	9	166	13
Visits To Friends & Relatives	0.79	32	6.86	36	279	23
Study	0.03	1	1.63	8	52	4
Other	0.11	4	1.37	7	98	8
Total	2.48	100	19.34	100	1,235	100

2 Top Origins of Overseas Tourists 2008

	Trips ('000)	(%)	Nights (m)	(%)	Spend (£m)	(%)
USA	340	14	2.75	14	260	21
Germany	257	10	1.77	9	93	8
Ireland	242	10	0.76	4	76	6
France	219	9	1.66	9	74	6
Netherlands	135	5	1.19	6	110	9
Canada	116	5	1.19	6	86	7
Poland	111	5	0.93	5	27	2
Italy	110	5	0.81	4	56	5
Spain	110	4	1.04	5	52	4
Australia	108	4	1.27	7	64	5
Rest of World	727	29	5.97	31	337	27
Total	2,475	100	19.34	100	1,235	100

3 Average Length of Stay and Spend

	Length of Stay (nights)	Spend per trip (£)	Spend per night (£)
Scottish	3.3	158.7	48.3
English	4.0	293.0	72.7
Rest of the UK	3.3	356.1	109.1
All UK	3.6	231.4	63.6
All Overseas	7.8	498.0	63.9
ALL	4.3	276.6	63.7

4 Time of Visit

	(%)	Jan - Mar	Apr - Jun	July - Sept	Oct - Dec
UK Holiday Trips	17	24	36	23	23
UK Business Trips	22	28	26	24	24
Total UK Trips	21	24	33	22	22
Overseas Holiday Trips	12	30	47	11	11
Overseas Business Trips	32	20	31	17	17
Total Overseas Trips	19	27	38	16	16

5 Transport Used to Travel to Scotland

UK Tourists	Total Trips (%)	Holiday Trips (%)
Car	67	67
Train	11	10
Coach tour	3	4
Regular bus/coach	4	5
Air	11	10
Other	4	4
Overseas Tourists†		
Air	75	68
Sea And Tunnel	25	32

† Transport used to reach UK

6 Accommodation Used

	UK Trips 2008 (%)	Overseas Trips (%)†
Hotel/Motel and Guest Houses	38	46
Friend's/Relative's House	35	29
Self Catering/Rented Accommodation	10	5
Bed and Breakfast	6	12
Touring Caravan & Camping	6	2
Youth Hostel/School/ University	2	5
Other	3	1

† 2007 data

7 UK Tourism by Country of Origin & Purpose

	Trips (%)		Nights (%)		Spend (%)	
	All	Holiday	All	Holiday	All	Holiday
England	47	47	52	52	60	59
Scotland	48	48	43	43	32	34
Northern Ireland	3	4	3	3	5	5
Wales	2	1	2	2	3	2

8 UK Visitor Activities undertaken in Scotland†

	UK Holiday Trips (%)
Hiking/Hillwalking/Rambling/ Other walking	47
Heritage, Architecture, Literature etc.	23
Shopping	14
Touring/Sightseeing	13
Wildlife watching & Zoo Park Visits	9
Watching performing arts (including cinema)	8
Adventure Sports	4
Fishing	4
Golf	3
Cycling	3

† 3 year average 2006-2008

9 Demographics of UK Visitors to Scotland

Age %	16-24	25-34	35-44	45-54	55-64	65+
All Trips	11	18	23	19	15	14
Holiday Trips	10	17	21	18	17	17
	Children in Household		Socio-Economic			
	Yes	No	AB	C1	C2	DE
All Trips	28	72	34	30	20	16
Holiday Trips	29	71	32	30	20	18

10 UK Tourists' Categories of Expenditure

	UK Tourist Spend (%)
Accommodation	32
Eating & Drinking	16
Travel in UK	15
Buying Clothes	13
General Shopping	10
Entertainment	9
Packages (inc. Accom.)	4
Other	1

11 Monthly Accommodation Occupancy 2008

2008	Hotel	Self Catering	Touring Caravan & Camping Park	Guest House & Bed Breakfast	Hostel
	(% Room Occupancy)	(% Unit Occupancy)	(% Pitch Occupancy)†	(% Room Occupancy)	(% Bed Occupancy)
Jan	49	27	-	22	19
Feb	57	37	-	27	30
Mar	58	40	-	34	44
Apr	61	48	25	37	44
May	69	63	47	56	58
Jun	72	67	50	60	60
Jul	71	76	60	66	64
Aug	78	83	63	73	72
Sep	73	63	42	59	53
Oct	66	55	25	45	41
Nov	59	29	-	32	24
Dec	47	31	-	26	24
Ann avg	64	52	45	46	45

† Survey of Touring Caravan and Camping Park occupancy is only conducted from April to October

12 Visitor Attractions 2008

Major Attractions with free admission	Visits	% 08/07
Kelvingrove Art Gallery & Museum, Glasgow**	1,445,098	-35.3
The National Gallery Complex, Edinburgh	842,958	-10.3
World Famous Old Blacksmith's Shop Centre, Gretna Green	665,688	-6.1
National Museum of Scotland, Edinburgh	614,894	-27.0
Gallery of Modern Art, Glasgow	562,595	-2.5
St Giles' Cathedral, Edinburgh	530,000	8.7
Royal Botanic Garden Edinburgh, Edinburgh	505,325	-16.8
Falkirk Wheel, Falkirk	500,829	-2.5
National War Museum, Edinburgh	474,133	1.3
Museum of Transport, Glasgow	456,324	-14.8

Major Attractions with paid admission

Edinburgh Castle, Edinburgh	1,128,394	-8.2
Edinburgh Zoo, Edinburgh	661,763	8.9
Edinburgh Bus Tours, Edinburgh	517,793	2.6
Glasgow Science Centre, Glasgow	480,834	0.0
Stirling Castle, Stirling	375,344	-3.5
Scottish Parliament Visitor Centre, Edinburgh	323,722	-8.2
Our Dynamic Earth, Edinburgh	298,288	2.6
Burns National Heritage Park, Ayr	292,317	-18.1
Urquhart Castle, Drumadrochit	270,097	-2.6
Royal Yacht Britannia, Edinburgh	255,806	0.1

* The World Famous Old Blacksmith's Shop Centre is a free attraction but has an important paid element.

13 Tourism-related Employment 2006

	Tourism Employment '000	All Employment '000	Tourism as a % of All Employment
All Scotland	218.2	2,370.6	9.2

NB: The above employment figures exclude self-employed.

14 Tourism Economy in Scotland 2006

	Gross Value Added (£m)	Gross Value Added (% Total Economy)	Gross Value Added (% Service Sector)
Scotland	4,040	5%	11%

NB: 2007 figures are expected to be published August 2008.

15 Scottish Weather 2008

	Average Temperature	Average Rainfall	Average Sunshine
Scotland	+0.5°C	+14%	+2%

NB: Scottish regional value compared with 1971-2000 long term averages

MAIN SOURCES OF STATISTICS

International Passenger Survey 2008 Provisional

United Kingdom Tourism Survey 2008

Scottish Accommodation Occupancy Survey 2008

Scottish Visitor Attraction Monitor 2008

Annual Business Inquiry 2006 NOMIS

Scottish Annual Business Statistics 2006 Scottish Government

Met Office Annual Regional Values 2008

DEFINITIONS

'A tourist trip' is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes except such activities as boarding education or semi-permanent employment.

'Tourist nights' are those spent away from home using any type of accommodation, or in transit, on a trip (as above).

'Tourist expenditure' is spending incurred while away from home on a tourist trip and on advance payments for such items as fares and accommodation. For overseas visitors cost of travel to the UK is excluded. In this fact sheet expenditure is in 2008 prices.

In this publication percentage figures may not add up to 100% due to rounding and, as with all surveys, the data are subject to sampling errors which particularly affect the smaller regions of Scotland.

** In 2008 Kelvingrove Art Gallery & Museum recorded 1,444,828 remaining the most visited visitor attraction in Scotland since its reopening in July 2006 following a major three year refurbishment. The levelling off of visitation levels has dramatically impacted calculations comparing attendance to 2007.

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