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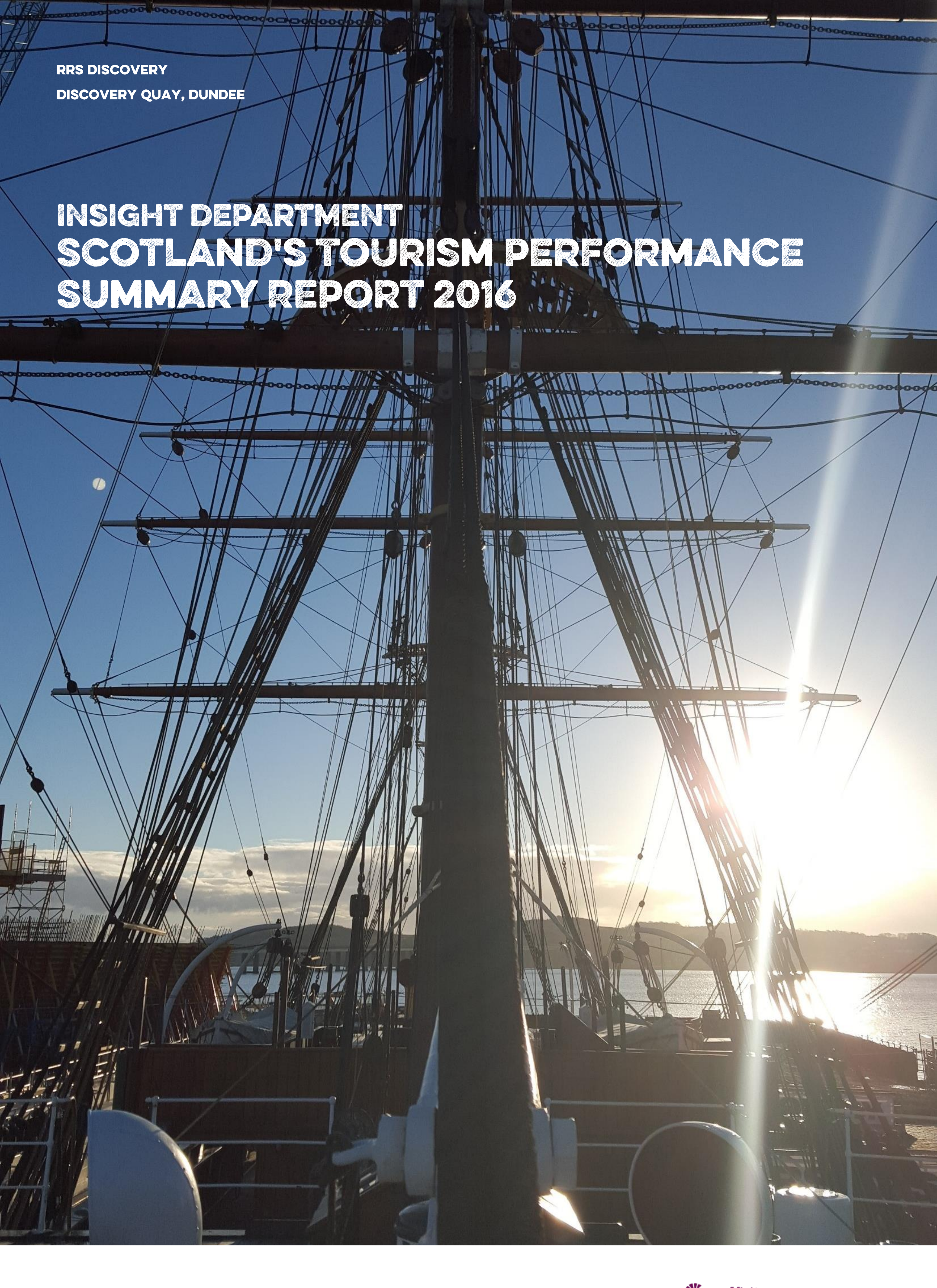
INSIGHT DEPARTMENT
SCOTLAND'S TOURISM PERFORMANCE SUMMARY REPORT 2016



June 2017

TOURISM STATISTICS 2016

Tourism Visitor Volume and Value to Scotland

Market	Trips		Nights		Spend	
	2016 (Million)	% Ch Y-o-Y	2016 (Million)	% Ch Y-o-Y	2016 (Million)	% Ch Y-o-Y
International Inbound [a]	2.75	6.0%	21.23	-1.2%	£1,850	9.1%
Domestic GB Resident Overnight [b]	11.52	-3.9%	38.89	-5.9%	Data Pending	
Combined Overnight Total [a+b]	**14.26**	**-2.2%**	**60.12**	**-4.3%**	~	
Tourism Day Visits [c]	142	14.5%	Not Applicable		£4,916	23.5%
Overall Tourism [a+b+c]	**156.26**	**12.8%**	**60.12**	**-4.3%**	~	

Tourism Visitor Volume and Value to Britain

Market	Trips		Nights		Spend	
	2016 (Million)	% Ch	2016 (Million)	% Ch	2016 (Million)	% Ch
International Inbound [a]	37.61	4.1%	277.29	2.2%	£22,540	2.1%
Domestic GB Resident Overnight [b]	119.44	-4.0%	356.87	-5.2%	Data Pending	
Combined Overnight Total [a+b]	**157.05**	**-2.2%**	**634.16**	**-2.4%**	~	
Tourism Day Visits [c]	1,834	20.3%	Not Applicable		£63,904	18.6%
Overall Tourism [a+b+c]	**1991.05**	**18.1%**	**634.16**	**-2.4%**	~	

Outbound Tourism Visitor Volume and Value from Britain

Market	Trips		Spend	
	2016 (Million)	% Ch	2016 (Million)	% Ch
UK Resident Outbound Travel [a]	70.82	7.8%	£43,771	21.2%
UK Balance of Tourism Trade	-33.21	~	- £21,231	~
Scottish Resident Outbound Travel [a]	4.13	4.2%	£3,002	12.3%
Scottish Balance of Tourism Trade	-1.38	~	- £1,152	~

Sources:

a) International Passenger Survey (IPS)

b) Great Britain Tourism Survey (GBTS)

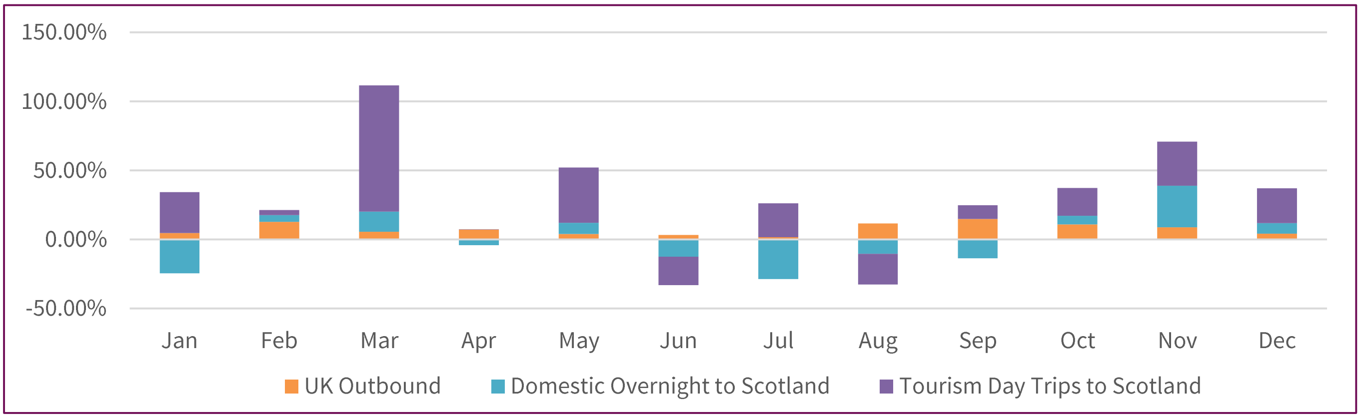
c) Great Britain Day Visit Survey (GBDVS)

d) Balance of Tourism Trade = Inbound Travel – Outbound Travel

Interpretation of Scottish Tourism Performance 2016

Tourism performance in Scotland during 2016 demonstrated a complex relationship between domestic and international visitor behaviour.

Year on Year change in visitor numbers for domestic overnight trips, tourism day trips to Scotland and UK outbound travel (2016/2015)



GB resident overnight trips to Scotland declined by -3.9% over the year, however positive performance in domestic overnight tourism in Scotland occurred in the shoulder periods of Easter and October – coinciding with the traditional holiday period (Note Easter fell in March in 2016 and in April in 2015 and 2017). The summer months recorded a decline in domestic overnight tourism in Scotland compared to 2015. This has been attributed to:

- Historically strong domestic tourism performance in 2015.
- Decline in Scottish residents taking domestic overnight trips in Scotland. Scottish residents represent on average 50% of all domestic overnight trips in Scotland.
- Increase in UK resident outbound international trips (up 7% on 2015)
- Increase in tourism day trips in Scotland especially over the summer period. Scottish residents represent on average 90%/95% of tourism day trips.

It is therefore interpreted that 2016 saw Scottish residents taking more domestic overnight breaks during the Easter / October holiday periods. During the summer, foreign holidays proved more popular which suppressed discretionary short overnight breaks during the summer. This fall in discretionary short breaks was however substituted with increased day trip activity specifically to events, attractions, activities. Other activities that took place in 2016 which may have influenced behaviours include – Rio Olympics, Euro 2016, EU Referendum and the broader geopolitical situation.

International inbound tourism to Scotland in 2016 saw a 6% increase in visits and a 9% increase in spend, fuelled by strong growth from North America in particular but also from Rest of World markets.

Growth from North America was attributed to an increase in airline capacity between North America and Scotland, contributing a further 90,000 seats throughout 2016. Similarly, Scotland could be benefiting from three routes into Scotland via the Middle East which are attracting visitors from the rest of the world. Favourable exchange rates have also had a positive impact on travel from both North America and Rest of World.

EU visits were up overall, although it is recognised that EU15 market visits took a slight dip. This is potentially attributed to increased travel from our core markets to Iceland and Scandinavia, which are direct competitors of Scotland as recorded by the European Tourism Council reports. Markets such as Germany and France may have also have been impacted by security and safety concerns. Spend from the EU overall decreased. This may be attributed to an increase in self-drive holidays across Europe; a more cautious approach to spending because of the geo-political situation; but also potentially an increase in VFR trips by the “Other EU Countries” market bloc.

GBTS 2016 monthly results

Update 25th April 2017

Volume estimates for domestic overnight tourism (numbers of trips and nights) have now been published for the period January – December 2016.

The late publication of results for the 2016 survey is due to a delay in implementing a new data processing programme, which has required significantly more time than originally anticipated by the research agency responsible (TNS). There has also been a data collection issue which has resulted in an annual sample size c.10% lower than in previous years over the twelve month period – survey weighting has been used to correct for this in the published results.

Work on data processing for the expenditure estimate is still underway, and we will publish expenditure data for the full year as soon as this is finalised. We will then revert to our usual release procedure of monthly data c.12 weeks after the end of the reference month.

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