



Appendix 1 : Where we are

International Visits

The table below shows the significant growth in international visitor volume and value since 2001.

Overseas Visitors to Scotland

	2001	2002	2003	2004	2005	2006	2006v2001
Trips (m)	1.59	1.58	1.57	1.88	2.39	2.73	72%
Nights (m)	15.00	15.04	14.95	19.01	24.33	26.38	76%
Expenditure (£m)							
Historic prices	757	806	837	994	1208	1439	90%
Real prices (CPI)	823	865	886	1038	1235	1439	75%

Source : ONS International Passenger Survey

Note : Prestwick airport was included as a sampling point for the first time in 2005 giving a truer reflection of international traffic. Previously data for international passengers travelling through Prestwick had been estimated using information from interviews at a number of regional airports across the United Kingdom.

UK Visits

The table below shows UK visitor volume and value.

UK Visitors to Scotland

	2005	2006	2006v2005
Trips (m)	14.9	13.3	-11%
Nights (m)	53.9	47.2	-12%
Expenditure (£m)			
Historic prices	3,006	2,720	-10%
Real prices (CPI)	3,075	2,720	-12%

Source : UKTS

Note : As a result of introducing new methodology in 2005 it is not possible to compare these results with previous years and full year figures for 2005 contain an estimate for January to April so care should be exercised when interpreting the 2006v2005 comparison.

Total Volume and Value

The total visitor volume and value figures are given below.

Total Visitors to Scotland

	2005	2006	2006v2005
Trips (m)	17.26	16.01	-7%
Nights (m)	78.23	73.54	-6%
Expenditure (£m)			
Historic prices	4214	4159.26	-1%
Real prices (CPI)	4310	4159.26	-3%

Day Visits

Although we do not look at day visits as part of our headline numbers for volume and value these are important for tourism businesses around the country. We have estimates for these based on projections from VisitBritain. We are considering introducing a new day visits survey to give us more accurate and up to date information in this area.

	2002	2005	2005v2002
Trips (m)	98.6	91.0	-8%
Expenditure (£m)	2376	3457	45%

Occupancy

The table below shows figures for accommodation occupancy since 2001. These indicate a steady growth over the period and 2006 figures are, in the main, the highest for ten years despite the fact that the stock of accommodation has grown, particularly in hotels and self-catering.

Occupancy in Scotland						
	2001	2002	2003	2004	2005	2006
Hotels						
Bed Occupancy %	43	45	46	46	47	47
Room Occupancy %	58	60	61	61	62	63
Guest House & Bed & Breakfast						
Bed Occupancy %	32	35	36	38	38	37
Room Occupancy %	40	43	44	46	46	45
Self Catering						
Unit Occupancy %	48	49	52	51	54	54
Camping & Caravan						
Unit Occupancy %	30	32	34	35	40	44
Hostels						
Bed Occupancy %	47	46	46	46	46	44

Source : Scottish Accommodation Occupancy Survey, 2001 – 2006

The picture for Glasgow and Edinburgh is similar.

%	2004	2005	2006
Glasgow	69	70	73
Edinburgh	76	77	78

Source : Lynne Jones Research

Visitor Attractions

The following figures show the total number of visitors to attractions participating in the survey each year.

Scottish Visitor Attraction Visits

	2001	2002	2003	2004	2005	2006
Total Visits	36,398,996	41,349,813	37,921,012	39,129,922	40,129,922	44,915,595

Source : Visitor Attractions Monitor, 2001 - 2006

Business and Employment

Official figures from ONS Annual Business Inquiry are given below showing the growth in employment and businesses in tourism related sectors; latest data available is for 2005.

Employees

	2001	2002	2003	2004	2005	2005v2001
Tourism-related employment (excluding self-employed)	194,564	200,823	199,249	205,370	209,662	+8%

Source : NOMIS, 2001 - 2005

Businesses

	2001	2002	2003	2004	2005	2005v2001
Tourism-related businesses	18,551	18,699	18,614	18,647	18,987	+2%

Source : NOMIS, 2001 - 2005

From all the above we can conclude that there has been a significant recovery in Scottish tourism since 2001. Measurement of volume and value in our main market – the United Kingdom – can only be done with confidence looking forward but international growth has been significant and other indicators point to general strength across the industry.

Disclaimer

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