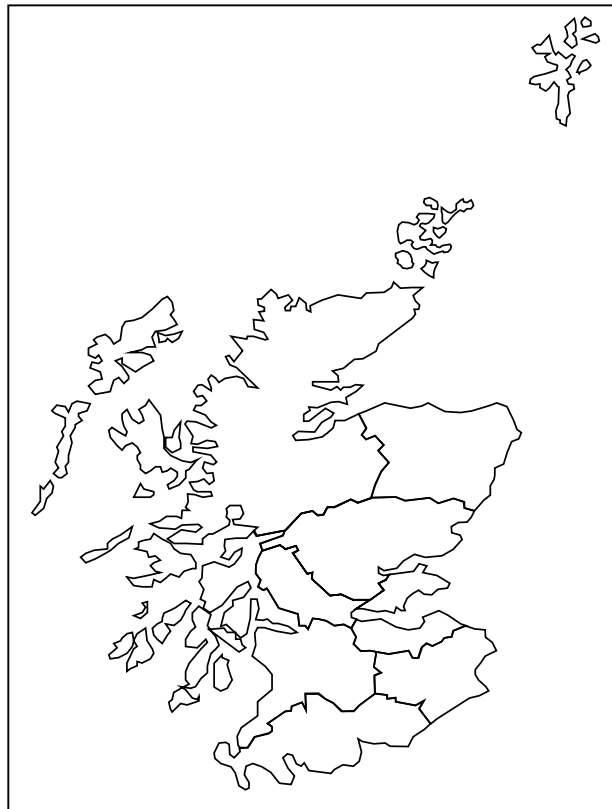


TOURISM IN SCOTLAND 2003



Introduction

In 2003, over 18 million tourists took overnight trips to Scotland. The annual expenditure was about £4.4 billion. In 2002, tourism supported around 9% of all employment.

	<i>Trips 2003 (m)</i>	<i>Nights 2003 (m)</i>	<i>Expenditure 2003 (£m)</i>
Scotland	8.0	26.0	1,347
England	7.8	33.4	2,079
Rest of the UK	0.7	2.6	169
Total UK Tourism	16.5	62.0	3,596
Total Overseas Tourism	1.6	14.9	839
<i>Total</i>	<i>18.1</i>	<i>76.9</i>	<i>4,435</i>

1 Volume and Value of Tourism in Scotland

	<i>Trips</i>		<i>Nights</i>		<i>Expenditure</i>	
	<i>(m)</i>	<i>(%)</i>	<i>(m)</i>	<i>(%)</i>	<i>(£m)</i>	<i>(%)</i>
<i>UK Tourists 2003</i>						
Holidays	10.7	65	43.7	71	2,356	66
Business	2.6	16	7.2	12	786	22
Visits to Friends & Relatives	2.7	16	8.6	14	327	9
Other	0.5	3	2.5	4	127	4
Total	16.5	100	62.0	100	3,596	100
<i>Overseas Tourists 2003</i>						
Holidays	0.8	50	6.3	42	417	50
Business	0.3	16	1.4	9	144	17
Visits To Friends & Relatives	0.4	27	4.6	31	168	20
Other	0.1	7	2.6	18	110	13
Total	1.6	100	14.9	100	839	100

Percentages might not add up to 100% due to rounding

Please note that figures supplied for domestic tourism (UK tourists) for 2003 in all subsequent tables are based on *three year averages for the 2001 to 2003 period*. Figures for overseas tourists are based on 2003 estimates, unless otherwise stated.

2 Top 5 Origins of Overseas Tourists 2003

	<i>Trips</i>		<i>Nights</i>		<i>Expenditure</i>	
	<i>('000)</i>	<i>(%)</i>	<i>(m)</i>	<i>(%)</i>	<i>(£m)</i>	<i>(%)</i>
USA	414	26	3.3	22	228	27
Germany	175	11	1.5	10	106	13
Australia	107	7	1.2	8	49	6
Canada	88	6	1.1	7	42	5
France	87	6	0.7	5	33	4
All Other Countries	694	41	7.1	48	381	45
<i>North America</i>	502	32	4.4	30	270	32
<i>Europe</i>	764	49	6.9	46	388	46
<i>Rest of World</i>	299	19	3.6	24	181	22
TOTAL	1,565	100	14.9	100	839	100

3 Average Length of Stay and Spend

	<i>Length of Stay (nights)</i>	<i>Spend per trip (£)</i>	<i>Spend per night (£)</i>
Scottish	3.0	150	49
English	4.2	254	61
Rest of the UK	4.1	301	73
All UK	3.6	204	56
All Overseas (2003)	9.3	524	56
ALL	4.1	231	56

4 Social Class of UK Tourists

	<i>% Holiday Trips</i>	<i>% VFR Trips</i>	<i>% Business Trips</i>	<i>% Total Trips</i>	<i>% UK Adult Population</i>
AB (Professional/Managerial)	34	28	42	34	22
C1 (Skilled Non-Manual)	29	28	31	29	27
C2 (Skilled Manual)	19	19	20	19	22
DE (Partly Skilled/Unskilled)	18	24	7	17	29

5 Age of Visitor

<i>Age</i>	<i>UK Tourists (%)</i>	<i>Overseas Tourists 2003 (%)</i>
0-15	-	5
16-24	13	12
25-34	20	21
35-44	23	18
45-54	18	20
55-64	13	16
65+	13	9

7 Time of Visit

	<i>Jan - Mar (%)</i>	<i>Apr - Jun (%)</i>	<i>July - Sept (%)</i>	<i>Oct - Dec (%)</i>
UK Holiday Trips	18	26	33	23
UK Business Trips	26	22	22	30
Total UK Trips	21	24	30	25
Overseas Holiday Trips -'02 *	7	26	60	7
Overseas Business Trips-'02 *	20	24	34	21
Total Overseas Trips -'03	12	20	52	15

* 2003 data not currently available for overseas visitors

8 Transport Used to Travel to Scotland

	<i>Total Trips (%)</i>	<i>Holiday Trips (%)</i>
UK Tourists		
Car	65	68
Train	10	10
Coach tour	3	4
Regular bus/coach	5	5
Air	11	9
Other	6	4
Overseas Tourists 2003†		
Air	82	72 *
Sea And Tunnel	19	24 *

† Transport used to reach UK; * 2003 data not currently available for overseas visitors

9 Accommodation Used

	<i>UK Trips (%)</i>	<i>Overseas Trips 2002* (%)</i>
Friend's/Relative's House	40	30
Hotel/Motel and Guest Houses	33	48
Self Catering/Rented Accommodation	6	3
Bed and Breakfast	9	16
Touring Caravan & Camping	8	3
Youth Hostel/School/ University	2	7
Other	7	5

* 2003 data not currently available for overseas visitors

10 Visitors' Attitudes

	<i>English (%)</i>	<i>Scottish (%)</i>	<i>U.S.A. (%)</i>	<i>German (%)</i>	<i>French (%)</i>	<i>Italian (%)</i>	<i>Spanish (%)</i>
Beautiful scenery	94	91	96	94	90	97	95
Friendly people	82	74	85	87	77	77	86
Good place to relax	85	81	67	72	63	61	75
Interesting history/culture	76	72	87	86	44	73	78
Good for hiking/walking	66	62	71	79	70	46	49
Plenty to do and see	64	40	81	69	70	55	71
Slower pace of life	57	63	47	41	45	65	57
Good places to eat out	40	44	50	15	15	13	14
Local products to eat & drink	39	44	40	27	27	21	34
Good pubs	26	26	45	75	51	48	49

11 *Activities undertaken (at all)*

	<i>UK Holiday Trips (%)</i>	<i>Overseas Holiday Trips 1996 (%)</i>
Visiting castles, monuments, churches etc.	39	83
Hiking/Hillwalking/Rambling/ Other walking	33	39
Visiting museums, galleries, heritage centres, etc.	29	58
Swimming	21	5
Field/Nature Study	17	9
Watching performing arts (including cinema)	16	16
Golf	8	2
Visiting Theme Parks/Activity Parks	8	6
Traditional Regional Music Events	7	n/a
Fishing	6	3

12 UK Tourists Categories of Expenditure

UK Tourist Spend (%)

Accommodation	28
Eating & Drinking	20
Travel in UK	18
General Shopping	7
Packages (inc. Accom.)	6
Entertainment	7
Buying Clothes	8
Other	5

13 UK Tourism by Area Tourist Board

	<i>Trips</i> (%)	<i>Nights</i> (%)	<i>Expenditure</i> (%)
Aberdeen & Grampian	9	9	9
Angus & the City of Dundee	3	3	2
Argyll, The Isles, Loch Lomond, Stirling and the Trossachs	13	13	11
Ayrshire & Arran	6	7	5
Dumfries & Galloway	6	5	4
Edinburgh & Lothians	21	15	22
Greater Glasgow and Clyde Valley	18	13	17
Highlands of Scotland	14	16	14
Kingdom of Fife	4	4	3
Perthshire	5	5	5
Scottish Borders	3	2	2
<i>Edinburgh</i>	18	13	20
<i>Glasgow</i>	16	11	15

14 Overseas Tourism by Area Tourist Board

	<i>Trips</i> (%)	<i>Nights</i> (%)	<i>Expenditure</i> (%)
Aberdeen & Grampian	7	5	6
Angus & the City of Dundee	3	3	3
Argyll, The Isles, Loch Lomond, Stirling And the Trossachs	13	7	7
Ayrshire & Arran	5	4	4
Dumfries & Galloway	2	1	1
Edinburgh & Lothians	51	34	33
Greater Glasgow and Clyde Valley	31	23	22
Highlands of Scotland	22	13	13
Kingdom of Fife	6	6	6
Perthshire	6	4	5
Scottish Borders	2	1	1
<i>Edinburgh</i>	49	21	30
<i>Glasgow</i>	27	11	18

15 *Tourism-related Employment by Area Tourist Board 2002*

	<i>Tourism Employment '000</i>	<i>All Employment '000</i>	<i>Tourism as a % of All Employment</i>
Aberdeen & Grampian	21	270	7.7
Angus & the City of Dundee	10	107	9.8
Argyll, the Isles, Loch Lomond, Stirling, and the Trossachs	18	181	9.9
Ayrshire & Arran	12	125	9.9
Dumfries & Galloway	6	56	11.1
Edinburgh & the Lothians	40	427	9.4
Greater Glasgow & Clyde Valley	58	761	7.6
Highlands of Scotland	10	92	10.6
Kingdom of Fife	11	135	8
Perthshire	8	58	14.3
Scottish Borders	4	42	8.9
Island ATBs	2	25	6.8
All Scotland	200	2,278	8.8

NB: The above employment figures exclude self-employed.

16 *Visitor Attractions*

<i>Major Attractions with free admission</i>	<i>Visits</i>
World Famous Old Blacksmith's Shop Centre+, Gretna Green	715,556
Royal Botanic Garden, Edinburgh	706,161*
Royal Museum and Museum of Scotland, Edinburgh	686,531*
National Gallery of Scotland, Edinburgh	434,429
New Lanark Village and Visitor Centre, Lanark+	404,500*
Museum of Transport, Glasgow	404,107*
St Giles' Cathedral, Edinburgh	402,550*
Gallery of Modern Art, Glasgow	381,298*
Glasgow Botanic Gardens, Glasgow	350,000*
Dundee Contemporary Arts, Dundee	325,507
 <i>Major Attractions with paid admission</i>	
Edinburgh Castle, Edinburgh	1,172,534
Edinburgh Zoo, Edinburgh	614,571
Glasgow Science Centre, Glasgow	416,924
Stirling Castle, Stirling	385,220
Royal Yacht Britannia, Edinburgh	310,697
The Scotch Whisky Heritage Centre, Edinburgh	241,428
Urquhart Castle, Inverness-shire	231,162
The Official Loch Ness 2000 Exhibition Centre, Inverness-shire	230,000*
CairnGorm Mountain Railway, nr Aviemore	187,015
Glencoe Visitor Centre, Ballachulish	182,181

* Estimated figure

+ The World Famous Old Blacksmith's Shop Centre and New Lanark Village and Visitor Centre are free attractions but have an important paid element.

17 Accommodation Registered with VisitScotland.com 2003

	<i>Properties</i>	<i>Bedrooms</i>	<i>Bedspaces</i>
Hotels	1,527	241,919	109,487
Guest Houses	885	37,839	13,440
Bed and Breakfast	2,075	49,651	12,619
Self Catering	3,636		
Caravan and Camping	264		
Hostels and University accommodation	200		

18 Liquor Licenses in Force at December 2003

<i>Type of Premises</i>	<i>Number</i>	<i>Percentage</i>
Hotels	2384	14
Restricted Hotel	470	3
Public House	5122	30
Restaurant	1474	9
Entertainment	852	5
Refreshment	642	4
Off-Sale	6104	36
All licenses in force	17048	100

19 Monthly Accommodation Occupancy

	<i>Hotel (% Room Occupancy)</i>	<i>Self Catering (% Unit Occupancy)</i>	<i>Touring Caravan and Camping Park (% Pitch Occupancy)</i>	<i>Guest House & Bed and Breakfast (% Room Occupancy)</i>	<i>Hostels (% Bed Occupancy)</i>
January	42	22	-	20	21
February	52	32	-	26	36
March	55	27	-	26	32
April	58	57	24	41	55
May	66	62	30	55	58
June	69	63	32	60	60
July	69	79	48	66	69
August	79	89	57	77	77
September	74	68	29	61	54
October	65	57	15	42	40
November	54	30	-	28	23
December	45	34	-	23	27
Annual average	61	53	34	45	47

20 Annual Hotel Room Occupancy by ATB

<i>Area Tourist Board</i>	<i>2000</i> <i>(%)</i>	<i>2001</i> <i>(%)</i>	<i>2002</i> <i>(%)</i>	<i>2003</i> <i>(%)</i>
Aberdeen & Grampian	59	62	62	60
Angus & City of Dundee	43	49	51	50
Perthshire	55	54	59	58
Fife	54	52	55	56
AILLST	53	56	56	57
Edinburgh & Lothians	69	66	71	73
Glasgow & Clyde Valley	61	61	61	62
Ayrshire & Arran	56	57	56	57
Scottish Borders	54	53	53	52
Dumfries & Galloway	49	52	51	50
Highlands of Scotland	54	54	58	60
Shetland	38	63	42	42
Orkney	48	48	53	55
Western Isles	49	51	52	53
Annual Average	58	58	60	61

21 Annual Guest House and B&B Room Occupancy by ATB

<i>Area Tourist Board</i>	<i>2000</i> <i>(%)</i>	<i>2001</i> <i>(%)</i>	<i>2002</i> <i>(%)</i>	<i>2003</i> <i>(%)</i>
Aberdeen & Grampian	44	41	41	39
Angus & City of Dundee	39	42	42	44
Perthshire	36	38	42	42
Fife	43	45	43	47
AILLST	43	45	48	51
Edinburgh & Lothians	56	56	57	54
Glasgow & Clyde Valley	54	52	56	60
Ayrshire & Arran	37	39	40	41
Scottish Borders	32	28	33	37
Dumfries & Galloway	33	30	36	38
Highlands of Scotland	36	34	41	42
Shetland	36	41	40	40
Orkney	37	31	34	41
Western Isles	21	21	21	22
Annual Average	41	41	44	45

22 Annual Self-Catering Unit Occupancy by ATB

<i>Area Tourist Board</i>	<i>2000</i> <i>(%)</i>	<i>2001</i> <i>(%)</i>	<i>2002</i> <i>(%)</i>	<i>2003</i> <i>(%)</i>
Aberdeen & Grampian	48	46	46	47
Angus & City of Dundee	38	37	34	46
Perthshire	57	58	60	59
Fife	57	61	48	56
AILLST	47	46	47	49
Edinburgh & Lothians	60	57	56	52
Glasgow & Clyde Valley	46	47	50	48
Ayrshire & Arran	46	37	49	50
Scottish Borders	50	45	50	51
Dumfries & Galloway	41	45	47	51
Highlands of Scotland	52	56	58	60
Shetland	33	45	42	41
Orkney	46	39	42	68
Western Isles	35	41	41	37
Annual Average	49	50	51	53

23 Seasonal Caravan and Camping Pitch Occupancy

	<i>2000</i> <i>(%)</i>	<i>2001</i> <i>(%)</i>	<i>2002</i> <i>(%)</i>	<i>2003</i> <i>(%)</i>
HIE area	25	27	28	31
NE Scotland & Fife	31	33	36	33
Argyll, Loch Lomond & Trossachs	29	33	34	35
Central Belt	26	24	25	30
South of Scotland	33	29	35	41
Seasonal Average	30	30	32	34

24 Leisure Day Visits 2002

	<i>Trips (m)</i>	<i>Spend (£m)</i>
Town / City	333	5,100
Seaside / Coast	42	300
Countryside	81	700
Total	456	6,200

- ◆ The UK accounts for 91% of tourism trips to Scotland.
- ◆ Overseas tourism accounts for 9% of tourism trips to Scotland.
- ◆ 72% of overseas trips are taken in April-September.
- ◆ The USA is our biggest overseas market, accounting for 26% of the overseas trips.
- ◆ 82% of overseas visitors who come to Scotland arrive in the UK by air and 65% of UK visitors come by car.
- ◆ Overseas tourists stay an average of 9.3 nights, Scottish tourists an average of 3.0 nights and English tourists an average of 4.2 nights.
- ◆ Average spend per night is £56 for overseas tourists and £61 for English tourists.
- ◆ The most popular destinations, for both overseas and UK tourists, are the Highlands, Edinburgh and Glasgow.
- ◆ A total of 37.9m visits were made to Scottish visitor attractions in 2003.
- ◆ An estimated 200,000 people were employed in tourism-related industries in Scotland.

MAIN SOURCES OF STATISTICS

International Passenger Survey 2003 and 2002

United Kingdom Tourism Survey 2001-2003

Accommodation Occupancy Studies 2003

Visitor Attractions Monitor 2003

GB Leisure Day Visits Survey 2002-2003

Census of Employment 2002. NOMIS – Office for National Statistics on-line database.

Tourism Attitudes Survey: 1999 and 2001

Scottish Executive Statistical Bulletin (Criminal Justice Series: CrJ/2004/3)

'Liquor Licensing in Scotland, 1999- 2003'

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.

NOTES ON DATA

Although the results for 2003 show a decline in UK tourists to Scotland this is contrary to results from other industry based surveys and anecdotal information at our disposal. As a result of this discrepancy, investigations are underway on ways to improve the UKTS survey process (Scotland and UK level). In a bid to improve the reliability of profile data three-year averages have been introduced for 2003.

Employment data is for 2002.

In this publication percentage figures may not add up to 100% due to rounding.

As with all surveys, the data is subject to sampling errors, which particularly affect the smaller ATBs.

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