



Insight Department:
Greater Glasgow and Clyde Valley Factsheet | 2019

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 Visit
Scotland | Alba™



Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Greater Glasgow and Clyde Valley region, defined as consisting of the following council areas: East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution. To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as purpose of travel, seasonality and average duration of trips.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Both international and domestic visitor figures are reported at Greater Glasgow and Clyde Valley regional level to allow for summing of figures and comparative analysis. Domestic figures are also available at local authority level, and these have been provided in addition where sample size allows. International data is only available for Greater Glasgow and Clyde Valley as a whole, and for the City of Glasgow.

This report starts with an **overall** evaluation of Greater Glasgow and Clyde Valley tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region and, if figures allow, provides sub-regional or council area breakdown. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Tourism in Glasgow and Clyde Valley

Latest Figures



Kip Marina, Inverkip, Inverclyde
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Overall Tourism Summary: Visits, Nights and Spend in Greater Glasgow and Clyde Valley , 2019

VISITS BREAKDOWN	Visits		Nights		Spend	
	000s	% Change 2018/19	000s	% Change 2018/19	£m	% Change 2018/19
Europe	405	-18%	1,870	-13%	145	-14%
North America	195	-12%	786	-27%	102	-5%
Rest of World	256	+5%	2,778	+14%	185	+17%
Total International Overnight	857	-11%	5,434	-4%	431	0%
Scotland	1,018	+55%	2,314	+92%	173	+59%
Rest of Great Britain	1,202	+4%	3,118	+1%	314	+19%
Total Domestic Overnight	2,219	+20%	5,433	+23%	487	+28%
Total Overnight Tourism	3,076	+10%	10,867	+8%	918	+13%
Total Day Tourism	29,743	-1%	N/A	N/A	1,254	+7%
Grand Total	32,819	0%	10,867	+8%	2,172	+9%

Sources: IPS/GBTS/GBDVS, 2019. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Greater Glasgow and Clyde Valley

Tourism Performance | 2019

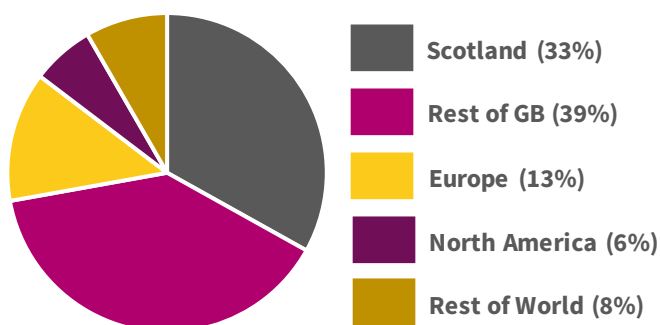
Overnight tourism in Greater Glasgow and the Clyde Valley **grew significantly** in 2019. Number of trips reached 3.1 million (+10%), bednights 10.9 million (+8%) and overnight tourism spend totalled at £918 million (+13%). This strong performance was underlain by a **rise in domestic travel** which offset a decline in international visitors to the region compared to 2018. Greater Glasgow and the Clyde Valley attracted **18% of all overnight visits** and **16% of the total overnight tourism expenditure** at a national level in 2019.

Residents of Great Britain undertook 72% of all overnight trips to the region – the highest share since 2016. The rise in domestic tourism was mostly due to **Scotland residents** who made 55% more trips and spent 59% more money than in 2018. English and Welsh visitors increased much more marginally, but still to a higher extent than seen at a Scotland level.

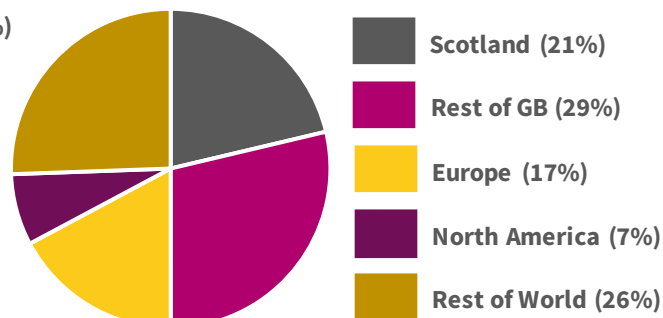
Overseas trips decreased by 11% due to a drop in visitors from Europe and North America. However, this had little impact on international bednights (-4%) and even less so on **international expenditure** which **remained largely unchanged**. While domestic tourism was more fundamental for the region’s visitor economy, overseas travellers continued to be an important part of Greater Glasgow and Clyde Valley’s visitor mix, generating 50% of the tourism bednights and 47% of the overnight expenditure.

Figures suggest that British residents made just under **30 million day trips** to the region in 2019 (-1%). Associated spend was roughly **£1.25 billion**, a 7% increase from 2018.

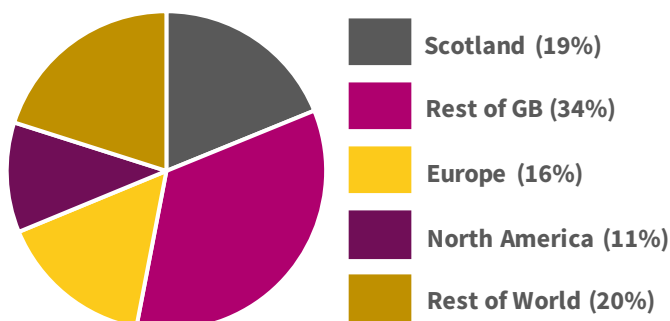
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2019. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

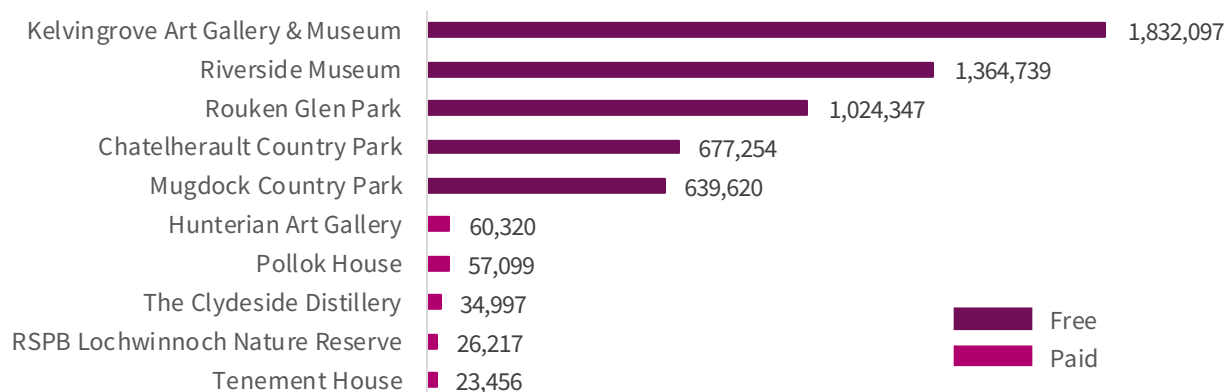
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
East Dunbartonshire	188	-1%	2.1	+5%	25.8	-23%
East Renfrewshire	164	+5%	1.6	0%	35.9	+46%
City of Glasgow	2,297	+6%	32.5	+11%	491.9	+12%
Inverclyde	178	-4%	2.1	+5%	43.8	+51%
North Lanarkshire	732	+10%	6.8	+6%	86.0	-30%
Renfrewshire	443	+1%	5.8	+2%	123.7	+40%
South Lanarkshire	804	+2%	8.3	-3%	151.0	+25%
West Dunbartonshire	224	0%	3.1	-6%	36.0	-41%
Greater Glasgow & Clyde Valley	5,030	+5%	62.3	+6%	994.1	+8%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types detailed on their website. Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Glasgow & Clyde Valley (Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Greater Glasgow & Clyde Valley Occupancy Rates by Accommodation Type and Month, 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	59%	71%	75%	77%	85%	87%	88%	91%	88%	81%	77%	68%	79%
Guest House/B&B (Room Occ.)	13%	26%	40%	19%	35%	19%	32%	35%	23%	23%	23%	25%	27%
Self-Catering (Unit Occ.)	29%	30%	30%	40%	43%	44%	40%	46%	45%	47%	52%	42%	41%
Hostel (Bed Occ.)	29%	45%	66%	55%	76%	63%	79%	85%	80%	66%	55%	48%	65%

Source: SAOS, 2019.

II. International Visitors to Glasgow & Clyde Valley Overnight Tourism

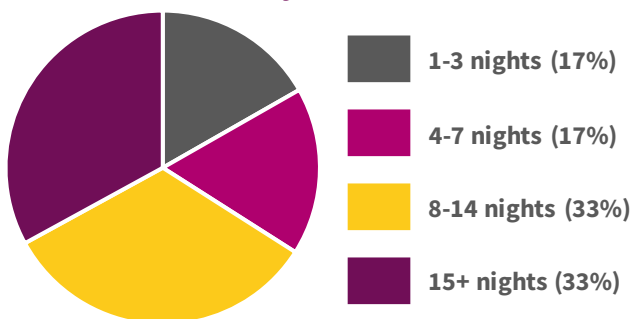
Figures suggest that the Greater Glasgow and Clyde Valley area was visited 857,000 times by overseas travellers in 2019. While this marked an 11% **decline in trips**, increases in visitors’ average length of stay and spend per trip led to total tourism expenditure similar to that of 2018. The region attracted a **quarter of all international visits** and **17% of the overseas spend** in Scotland in 2019. The drop in visitor figures was slightly more significant in Glasgow, indicating that the rest of the region enjoyed a rise in bednights and spend. The majority of overseas visitors to Greater Glasgow and the Clyde Valley travel for a holiday; yet, the shares of business and VFR trips are both above the national average.

National and Regional International Tourism Performance, 2019

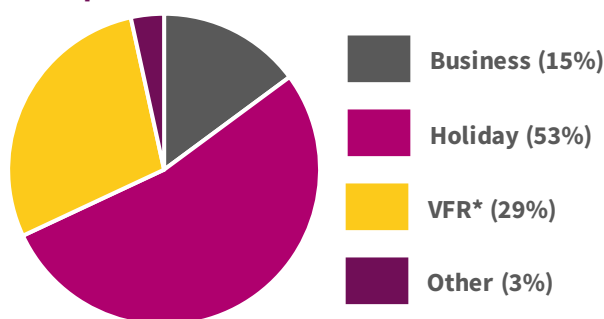
Indicators	Scotland		Greater Glasgow & Clyde Valley		Glasgow	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	3,460	-7%	857	-11%	771	-13%
Spend (£M)	2,538	+7%	431	0%	381	-1%
Nights (000s)	27,385	+8%	5,434	-4%	4,669	-8%
Average length of stay	7.9 nights	+16%	6.3 nights	+7%	6.1 nights	+6%
Average spend per day	£93	0%	£79	+4%	£82	+7%
Average spend per visit	£734	+15%	£503	+11%	£495	+13%

Source: IPS, 2019.

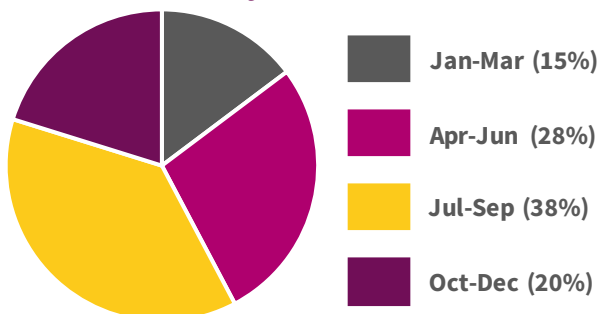
Duration of Stay



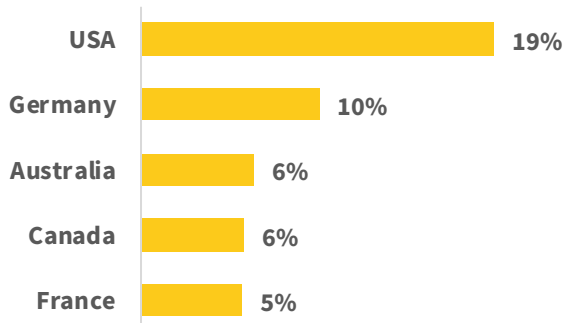
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Greater Glasgow & Clyde Valley. Figures may not sum up due to rounding. *VFR = Visiting friends or relatives.

III. Domestic Visitors to Glasgow & Clyde Valley Overnight Tourism

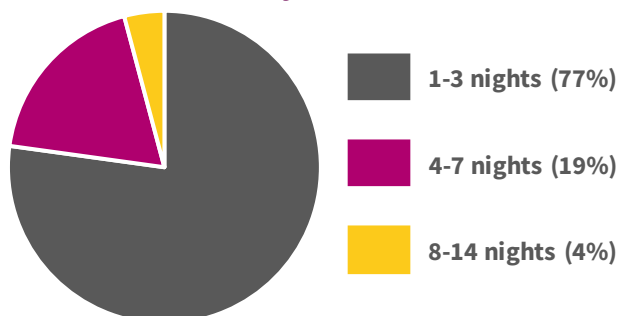
In 2019, British residents made **2.2 million** overnight trips to Greater Glasgow and Clyde Valley during which they spent 5.4 million nights and nearly half a billion pounds. This represents **16% of the visits** and **15% of the total domestic overnight spend in Scotland** for the year. The volume and value of domestic tourism in the region increased substantially from 2018, outpacing the notable growth observed on national level. This was mostly a result of a **big rise in short breaks** (up to 3 nights), particularly by Scottish residents. The number of domestic visits increased across all main travel purposes and seasons, except for the first quarter of the calendar year.

Domestic Overnight Tourism, 2019

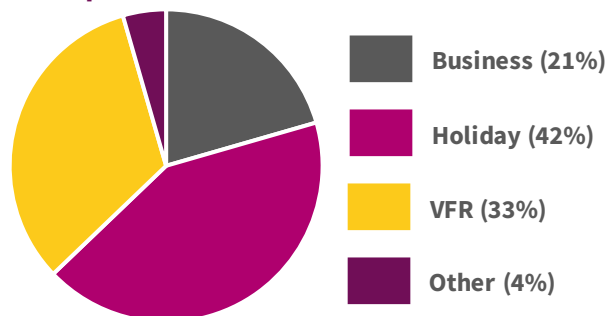
Indicators	Scotland		Greater Glasgow & Clyde Valley		Glasgow	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	13,810	+17%	2,219	+20%	1,685	+18%
Spend (£M)	3,200	+16%	487	+28%	393	+26%
Nights (000s)	46,413	+15%	5,433	+23%	3,802	+13%
Average length of stay	3.4 nights	-2%	2.4 nights	+3%	2.3 nights	-4%
Average spend per day	£69	+1%	£90	+4%	£103	+11%
Average spend per visit	£232	-1%	£219	+7%	£233	+7%

Source: GBTS, 2019.

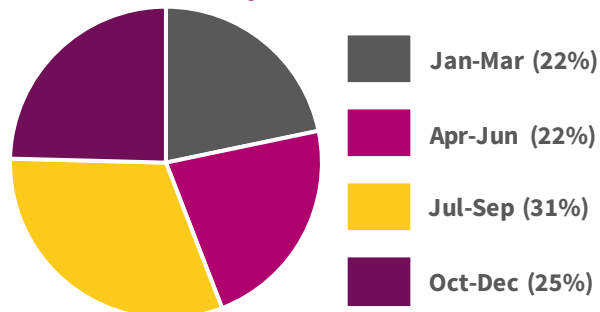
Duration of Stay



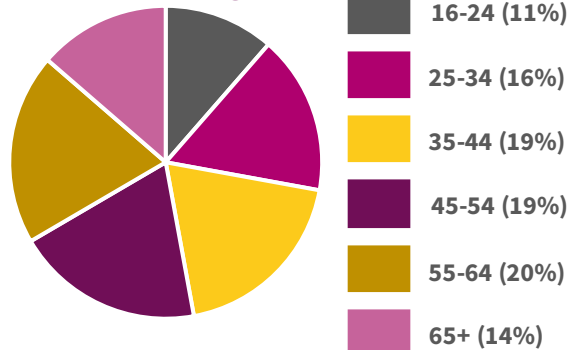
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Greater Glasgow & Clyde Valley. Figures may not sum up due to rounding.

Domestic Day Visits to Glasgow & Clyde Valley

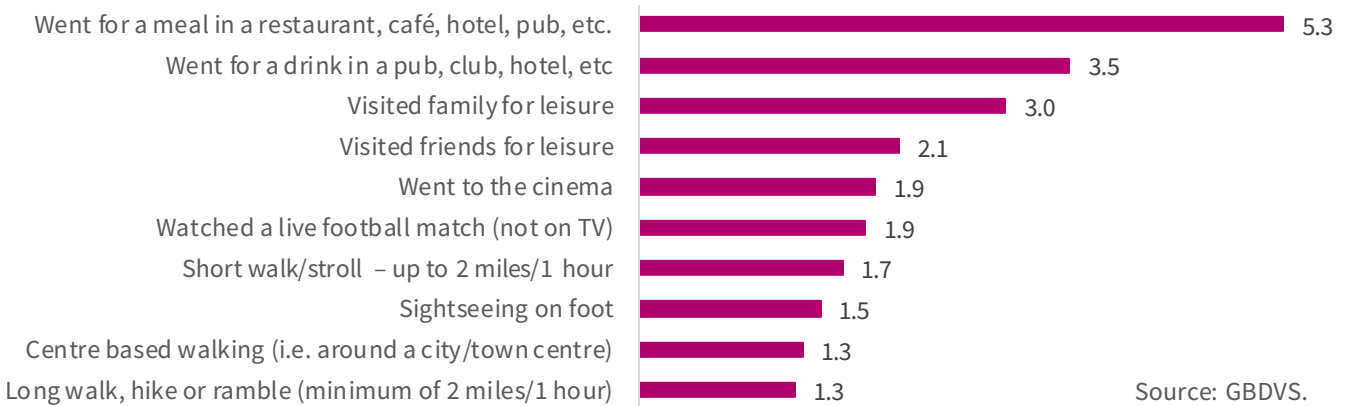
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Greater Glasgow & Clyde Valley	31.4	-3%	1,294	+3%
Glasgow	19.1	+2%	1,008	+6%

Source: GBDVS.

Most Popular Activities Undertaken as Part of a Day Trip, Greater Glasgow & Clyde Valley: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.

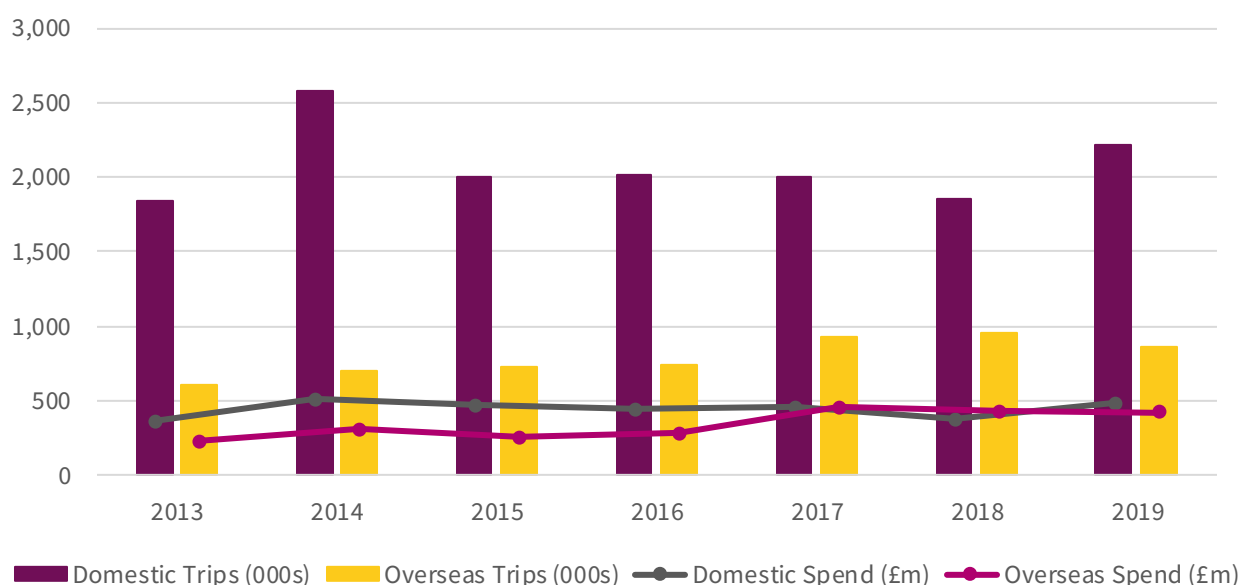


Visitors to Glasgow & Clyde Valley

Historical Trend Information | 2013 - 2019

In 2019, the total number of **overnight trips and associated tourism expenditure** in Greater Glasgow and Clyde Valley were the **second highest over the last seven years**. Following a plateau between 2015 and 2017 and a subsequent drop in 2018, domestic trips increased to be 8% above the annual average for the 2013-2018 period. Domestic overnight spend also rose significantly for the first time since 2014. While overseas residents made fewer trips to Greater Glasgow and Clyde Valley than British residents, in 2017-2019 their **spend was nearly identical** – just over £440 million per year. In 2019, international visits to the region dropped for the first time since 2011.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	1,835	2,580	1,995	2,012	2,005	1,848	2,219
International (000s)	601	702	722	737	923	959	857
Total Overnight (000s)	2,436	3,282	2,717	2,749	2,928	2,807	3,076

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	371	511	473	451	459	380	487
International (£m)	229	315	261	283	466	434	431
Total Overnight (£m)	600	826	734	734	925	814	918

Sources: GBTS, IPS.

Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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