



Insight Department:
Scottish Borders Factsheet | 2019

Published: January 2021





Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in the Scottish Borders. 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 visitors' region of residence, purpose of travel, or seasonality of trips.

Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9. These ensure the publication is consistent with other regional factsheets published on visitscotland.org and indicate changes in tourism performance over time. However, it is strongly recommended to refer to the 3-year average figures on page 3 when analysing the volume and value of tourism in the region.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS.

This report starts with an **overall** evaluation of Scottish Borders tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance 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. Overall Tourism in the Scottish Borders Latest Figures



Abbotsford House
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Overall Tourism Summary: Visits, Nights and Spend in the Scottish Borders, 2017-2019 Annual Average Figures

VISITS BREAKDOWN	Visits		Nights		Spend	
	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (000s)	% Change 2016-18/ 2017-19	2017-19 Average (£m)	% Change 2016-18/ 2017-19
Europe	22	+10%	89	+33%	6	-1%
North America*	4	-33%	16	-24%	1	-14%
Rest of World*	3	+50%	22	+57%	1	+104%
Total International Overnight	29	+7%	127	+26%	9	+6%
Scotland	144	+13%	387	+51%	24	+14%
Rest of Great Britain	196	+7%	750	+14%	39	+15%
Total Domestic Overnight	340	+9%	1,137	+25%	63	+15%
Total Overnight Tourism	369	+9%	1,264	+25%	72	+13%
Total Day Tourism	2,705	-10%	N/A	N/A	72	+18%
Grand Total	3,074	-8%	1,264	+25%	144	+16%

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding. *Based on very low sample sizes. National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to the Scottish Borders

Tourism Performance | 2019

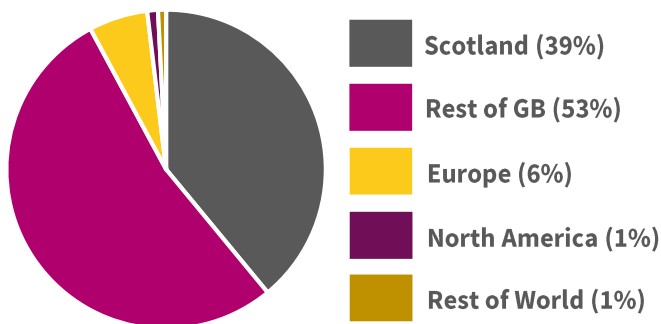
In 2017-2019, the Scottish Borders experienced **growth in overnight tourism**. At 369,000 per year, the number of overnight visits to the region rose by 9% from 2016-2018. Bednights and tourism expenditure increased more significantly, by 25% and 13%, respectively, over the same period.

The growth was largely driven by **domestic visitors**, in particular by residents of Scotland who made 13% more overnight trips during which they spent 14% more money compared to 2016-2018. **English and Welsh** residents also travelled more to the Scottish Borders in 2017-2019. They generated **more than half** of the total trips, bednights and overnight expenditure in the region, and across all of Scotland, their significance for regional tourism performance was greater only in Dumfries and Galloway.

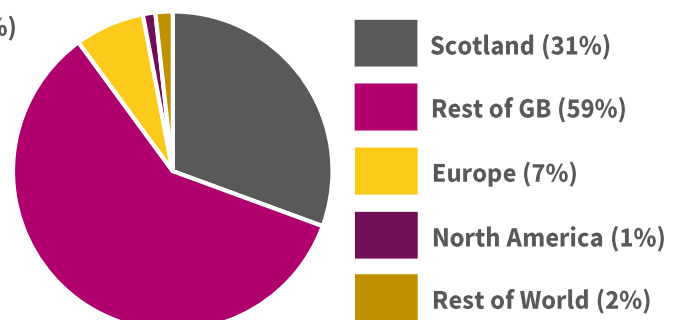
International visitors to the Borders also rose in numbers in 2017-2019. The increase in the total number of bednights they spent in the region was much greater than the growth in trips, indicating a **rise in visitors' average length of stay**. The vast majority of overseas travellers were **European**, predominantly residents of the Netherlands and Germany. There were no significant changes in the Borders' visitor mix from 2016-2018.

Domestic **day tourism trips** to the Scottish Borders **fell** by 10% to 2.7 million per year between 2017 and 2019. Despite that, annual **day trip expenditure increased**, bringing the total net tourism spend to £144 million per year (+16%).

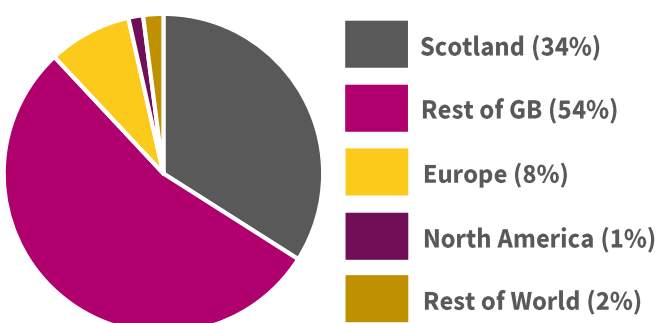
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2017-19. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

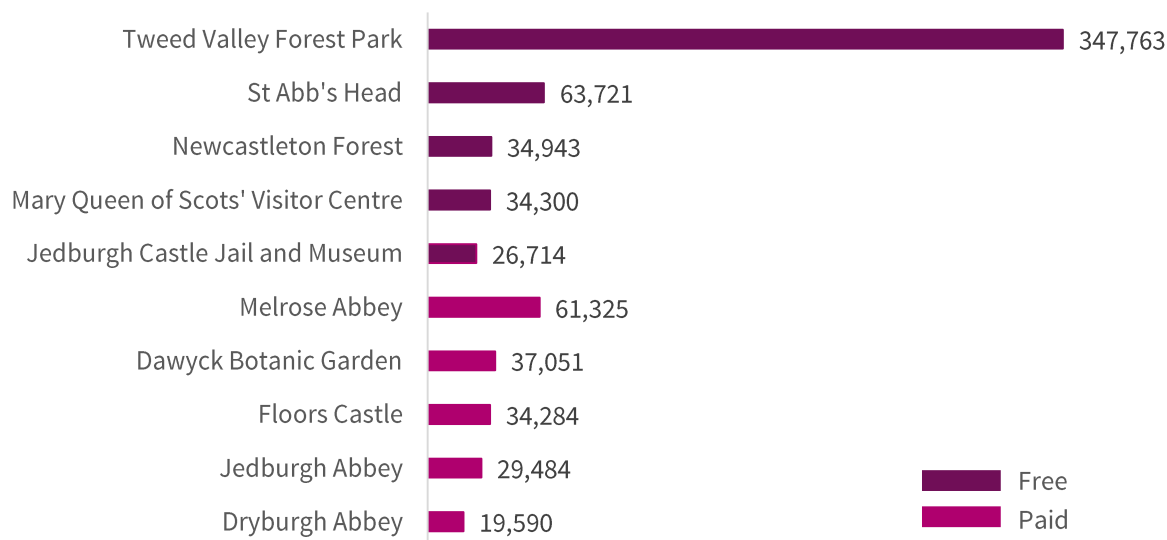
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Scottish Borders	461	0%	4.1	+2%	79.8	-13%

Source: SABS, 2018. 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 Ten Visitor Attractions in the Scottish Borders (with 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.

Occupancy Rates by Accommodation Type and Month, the Scottish Borders 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	36%	43%	62%	49%	62%	73%	69%	79%	71%	60%	38%	33%	57%
Guest House/B&B (Room Occ.)	3%	10%	24%	15%	68%	57%	56%	75%	65%	49%	29%	11%	39%
Self-Catering (Unit Occ.)	22%	39%	40%	56%	65%	72%	66%	83%	65%	60%	39%	30%	52%

Source: SAOS, 2019.

II. International Visitors to the Scottish Borders Overnight Tourism

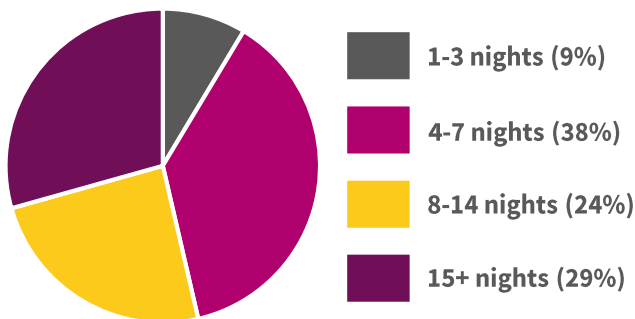
Visitor figures suggest international travellers made **29,000 trips** (+7%) per year to the Scottish Borders between 2017 and 2019. Annual bednights and expenditure estimates are 127,000 (+26%) and £9 million (+6%), respectively, over the same period. While the **average length of stay** of overseas visitors to the region **grew** to 4.4 nights, average spend per visit remained largely unchanged from 2016-2018 due to a drop in daily spend. This was result of an **increase in VFR trips** which made up 32% of all overseas visits to the region in 2017-2019, up from 24% in 2016-2018. Summer remained the most popular season to visit; however, growth was mostly observed in the first quarter of the calendar year.

International Tourism Performance, 2019 and 2017-19 Annual Average Figures

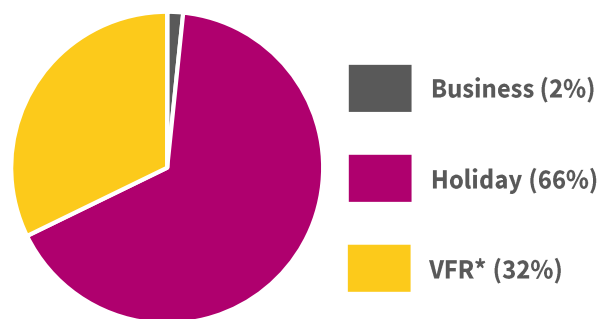
Indicators	Scotland		Scottish Borders			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	35	+13%	29	+7%
Spend (£M)	2,538	+7%	10	-5%	9	+6%
Nights (000s)	27,385	+8%	193	+48%	127	+26%
Average length of stay	7.9 nights	+16%	5.5 nights	+31%	4.4 nights	+17%
Average spend per day	£93	0%	£52	-36%	£67	-16%
Average spend per visit	£734	+15%	£285	-16%	£295	-1%

Source: IPS, 2019. *Annual Scottish Borders data is based on very low sample sizes.

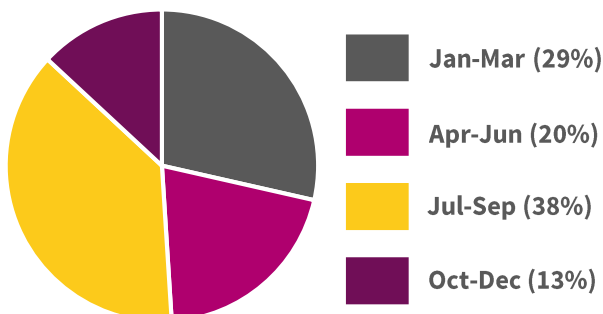
Duration of Stay



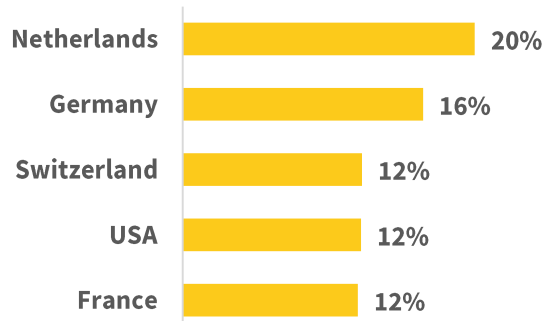
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019). Top Markets chart is based on very low sample sizes. *VFR = Visiting friends or relatives.

III. Domestic Visitors to the Scottish Borders

Overnight Tourism

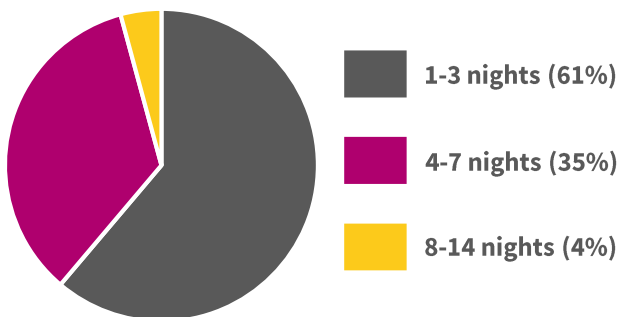
In 2017-2019, domestic travellers made **340,000 overnight trips** per year to the Scottish Borders, spending **1.1 million nights** and **£63 million** annually. These figures represent significant increases from 2016-2018 which – similarly to the growth in international tourism – were driven by a rise in the number of people **visiting friends and relatives**. The average British visitor to the Borders spent 3.3 nights and £185 during their trip which also marks increase from 2016-2018. The seasonality of domestic and international visits differed significantly. Between 2017 and 2019, the **last quarter** of the calendar year welcomed the most trips by British residents.

Domestic Overnight Tourism Performance, 2019 and 2017-19 Annual Average Figures

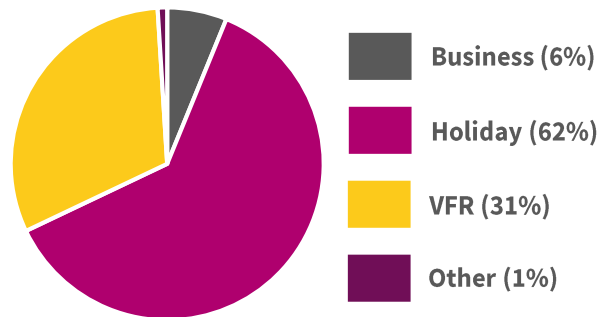
Indicators	Scotland		Scottish Borders			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	354	-9%	340	+9%
Spend (£M)	3,200	+16%	59	-16%	63	+15%
Nights (000s)	46,413	+15%	1,370	+12%	1,137	+25%
Average length of stay	3.4 nights	-2%	3.9 nights	+23%	3.3 nights	+14%
Average spend per day	£69	+1%	£43	-24%	£55	-8%
Average spend per visit	£232	-1%	£167	-7%	£185	+5%

Source: GBTS, 2019. *Annual Scottish Borders data is based on relatively low sample sizes.

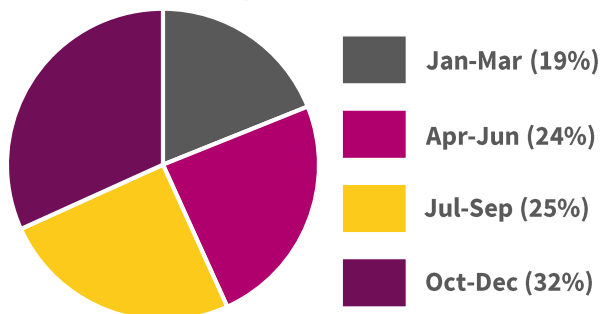
Duration of Stay



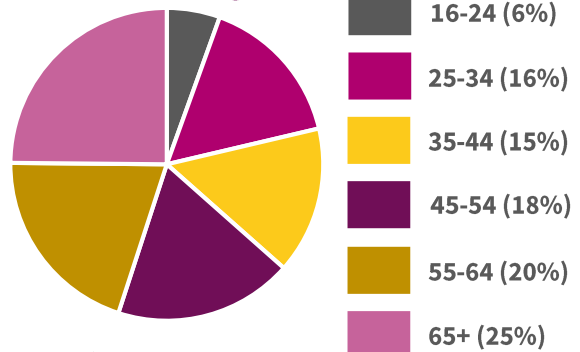
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019).

Domestic Day Visits to the Scottish Borders

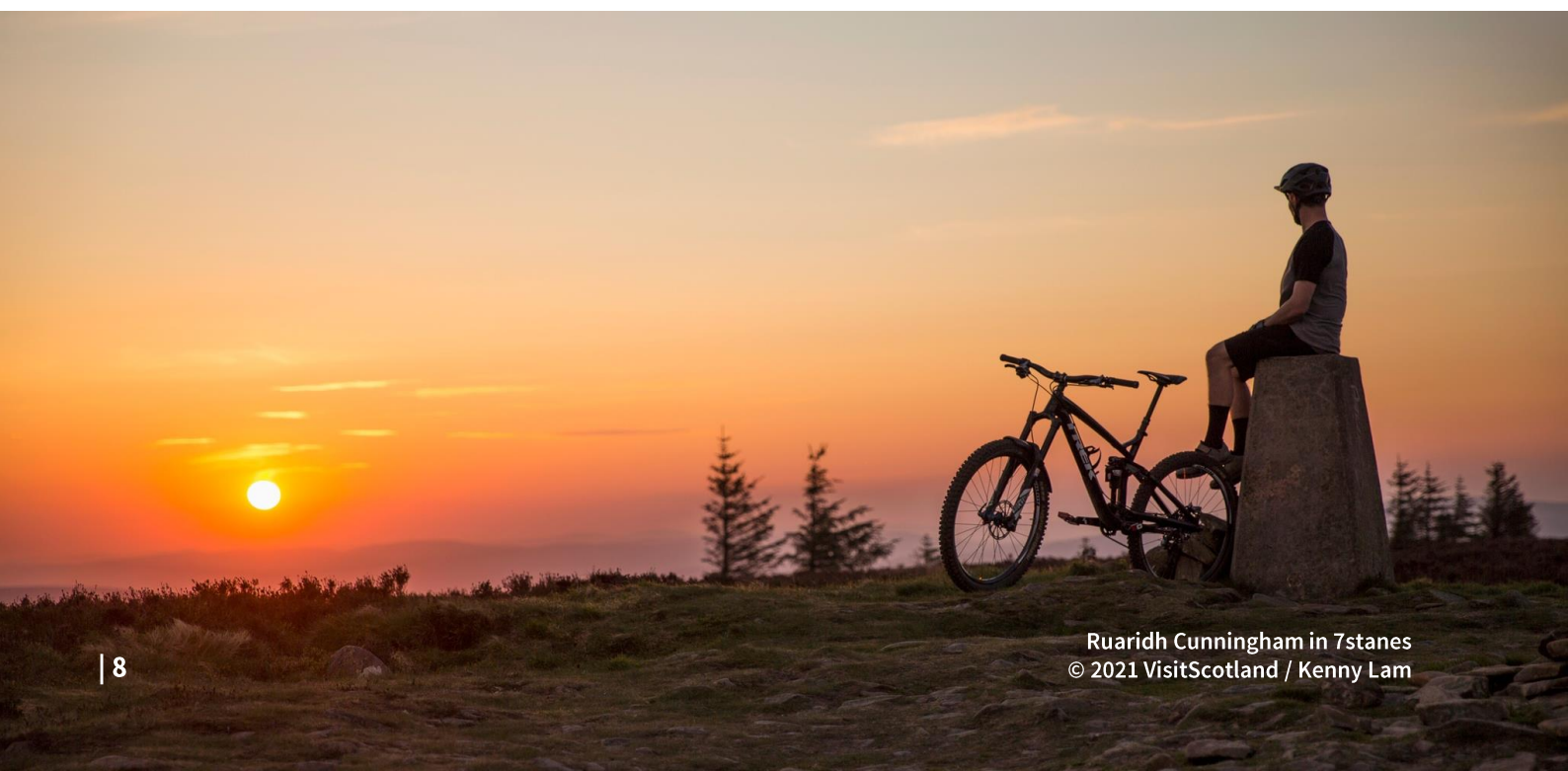
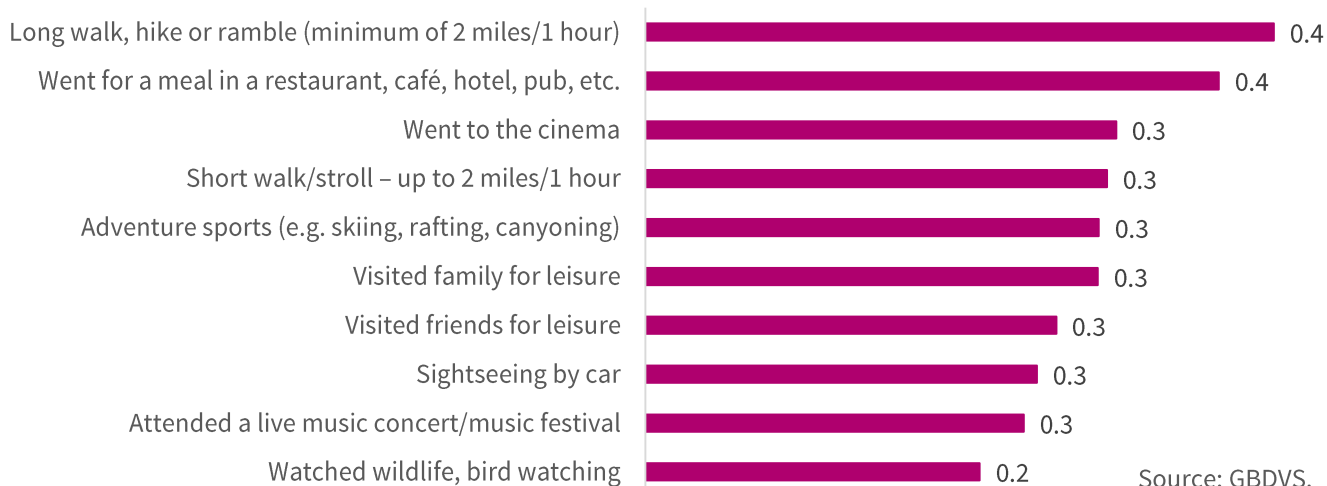
Tourism Performance and Activities

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%
Scottish Borders	2.7	-10%	72	+18%

Source: GBDVS.

Most Popular Activities Undertaken as Part of a Day Trip, the Scottish Borders: 2016-18 Average Annual Figures (Number of Day Trips in Millions)

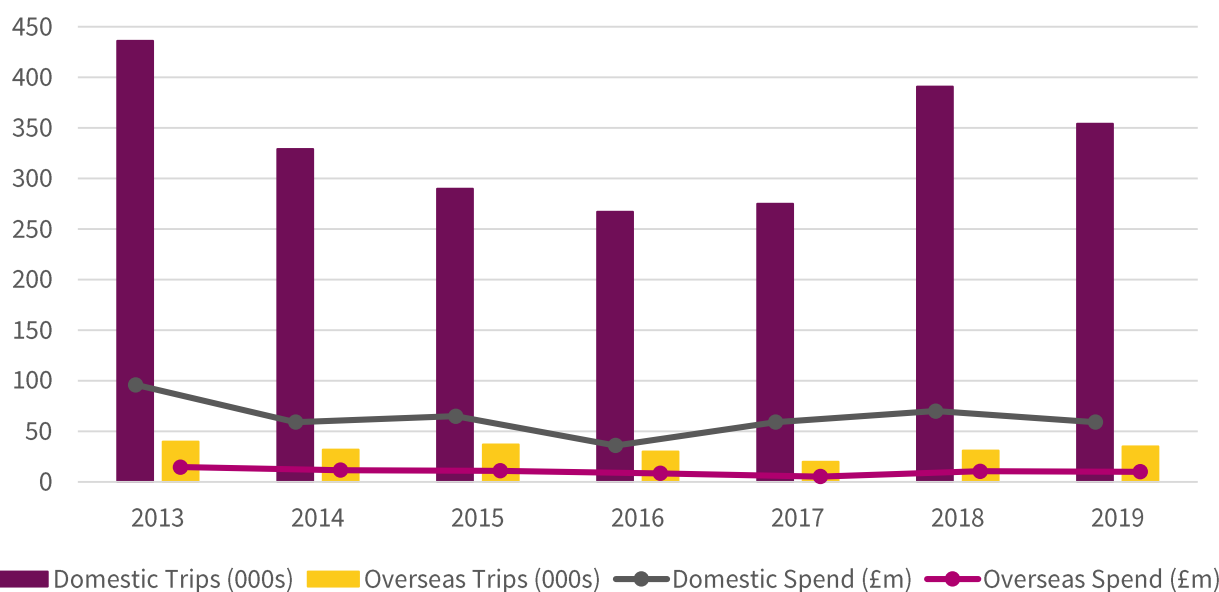


Visitors to the Scottish Borders

Historical Trend Information | 2013 - 2019

Annual data on visitors to the Scottish Borders is based on very low sample sizes which reduces its reliability. However, figures suggest that 2019 was the **third best year** for overnight tourism to the region **since 2013**. The annual variations in domestic travel – which accounted for 91% of the total overnight trips and 86% of the total overnight spend between 2017 and 2019 – continued to have a much greater impact on tourism performance. The number of overnight visits to the Borders made by British residents **rose** from 295,000 per year in 2014-2016 to 340,000 per year in 2017-2019 (+15%). Domestic spend **increased** from £53 million to £63 million annually (+18%) over the same period.

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)	436	329	290	267	275	391	354
International (000s)	40	32	37	30	20	31	35
Total Overnight (000s)	476	361	327	297	295	422	389

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	96	59	65	36	59	70	59
International (£m)	15	12	11	8	5	10	10
Total Overnight (£m)	111	71	76	44	64	80	69

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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Back Cover: St Abb's Head Lighthouse

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