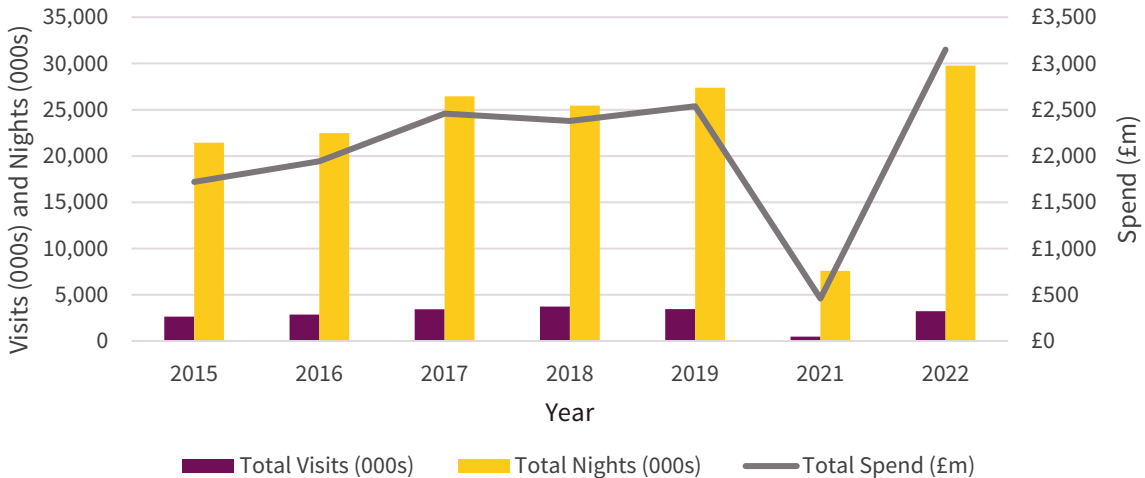


INTERNATIONAL TOURISM PERFORMANCE IN 2022

In 2022, international travel to Scotland showed strong signs of recovery from the effects of the COVID-19 pandemic. While the number of visits remained slightly lower than in 2019, the number of nights as well as visitor spending in Scotland surpassed pre-pandemic levels, signalling a promising revival in the tourism sector.

International Tourism Performance 2015-2022



A total of 3.2 million visits were made to Scotland by international visitors, staying for 29.7 million nights and spending £3,151m. Though visits were down 7% compared to 2019, the number of nights went up by 9% and visitor spending by 24% in nominal terms, each setting a new January-December record. Taking inflation into account, overall spend would have been up 10% on 2019, equivalent to £2,791m in 2019 prices.

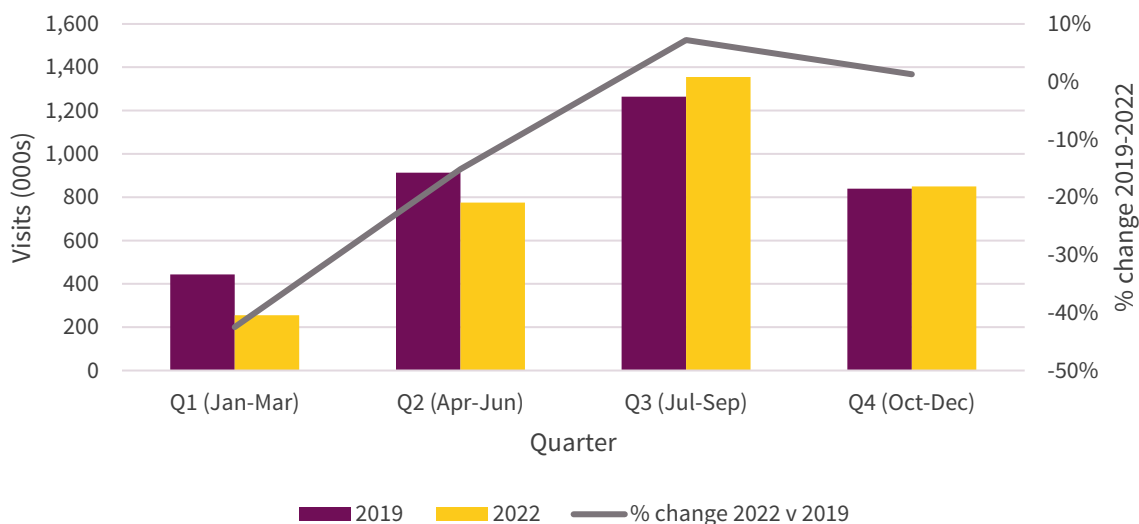
Year	Visits (000s)	Nights (000s)	Spend (£m)
2019	3,460	27,385	£2,538
2022	3,234	29,770	£3,151
Change on 2019	-7%	9%	24%

The average international visitor to Scotland in 2022 spent a total of £972 over a 9.2 day trip with a daily expenditure of £109. The increase in spend per trip is driven by longer stays (9.2 days in 2022 versus 7.9 in 2019), as well as a higher daily expenditure, 14% up on 2019 levels in nominal terms. Taking inflation into account, spend per visit would have been 17% up on 2019 (equivalent to £861 in 2019 prices), while daily expenditure would have been 4% up on 2019 (equivalent to £97 in 2019 prices).

Year	Spend/trip	Nights/trip	Spend/night
2019	£734	7.9	£93
2022	£972	9.2	£109
Change on 2019	32%	16%	14%

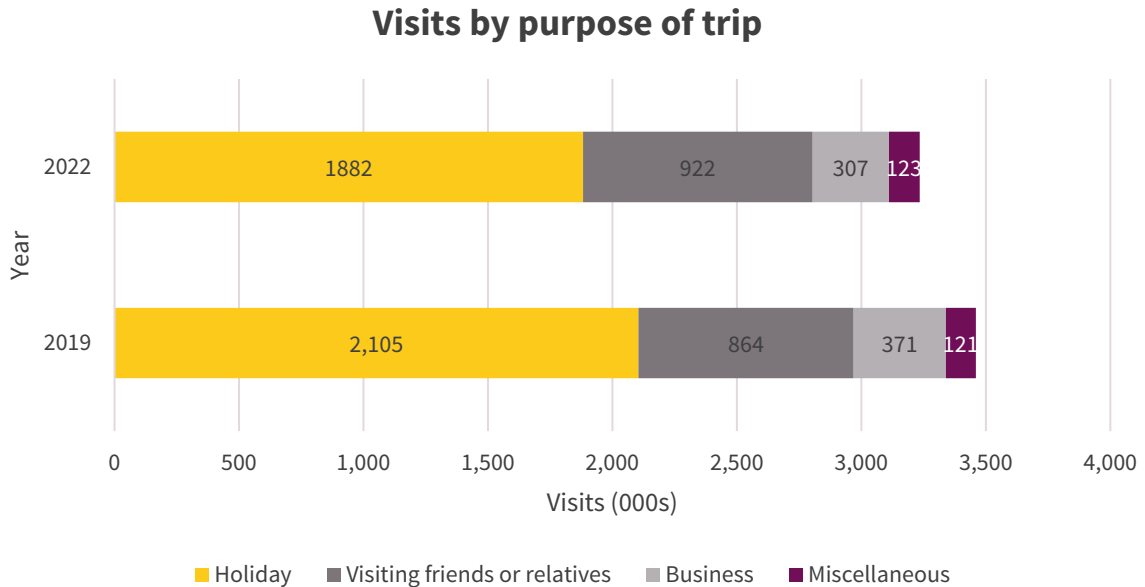
INTERNATIONAL TOURISM PERFORMANCE IN 2022

Seasonality of international visits to Scotland



When comparing visit numbers of 2022 to the pre-pandemic year of 2019, there was a mixed picture for Scotland's tourism industry. The first quarter (Q1) of 2022 saw a significant decline of 42% in visits compared to 2019. However, as the year progressed, there was a gradual recovery with a 15% decrease in the second quarter (Q2) and a subsequent 7% increase in the third quarter (Q3). The fourth quarter (Q4) saw a 1% increase on 2019, with 850,000 visits from October – December. This is the most visits recorded for Q4 in Scotland.

INTERNATIONAL TOURISM PERFORMANCE IN 2022



The trip purposes for visits to Scotland in 2022 were very similar to those observed in the pre-pandemic year of 2019. Holiday visits experienced a significant recovery, accounting for 58% of visits, compared to 61% in 2019. This suggests that Scotland has remained an appealing destination for leisure travellers following the COVID-19 pandemic.

Visits to see friends or relatives were slightly higher in proportion in 2022 compared to pre-pandemic, making up 29% of all visits compared to 25% in 2019. The larger proportion of visits of this nature are likely to have contributed to visitors staying for longer on average (9.2 days) compared to 2019 (7.9 days).

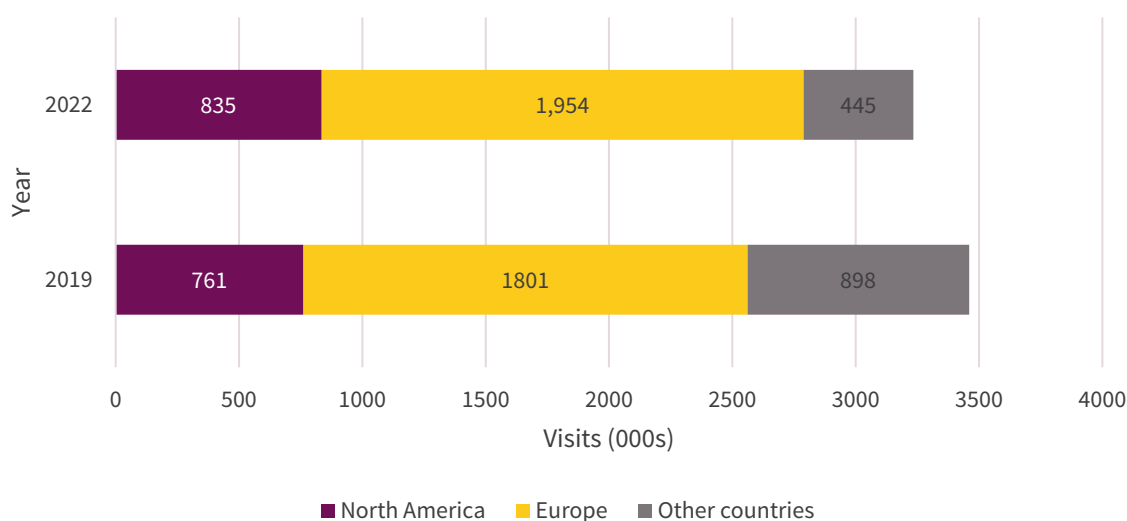
Business trips experienced a slight decline in 2022, making up 9% of visits, compared to 11% in 2019. This could be a result of businesses worldwide favouring hybrid and remote work models following the COVID-19 pandemic. Visits for ‘Miscellaneous’ purposes, such as education or medical trips, saw an increase, accounting for 4% of visits compared to 3% in 2019.

INTERNATIONAL TOURISM PERFORMANCE IN 2022

Year	North America	Europe	of which EU	of which EU15	of which other EU	Other countries	Total
2019	761	1,801	1,587	1,389	197	898	3,460
2022	835	1,954	1,702	1,462	241	445	3,234
Change on 2019	10%	8%	7%	5%	22%	-50%	-7%

As in 2019, short-haul visitors from Europe made up the majority (60%) of visits to Scotland in 2022. European markets made a strong recovery, with an 8% greater visit volume compared to pre-pandemic. Some EU markets performed even better, seeing up to a 22% surge in visit volumes compared to pre-pandemic levels. The North American market, a traditional market of strength for Scotland, also performed very well in 2022, with a 10% increase in visit volume compared to 2019. In contrast, ‘Other countries’, including traditional markets of strength such as China and Australia, failed to make the same level of recovery, instead seeing a considerable decline of 50% on 2019 levels. This is likely because China's domestic tourism market rebounded in 2022 to above pre-pandemic levels. Overall, while Scotland experienced a slight decrease of 7% in total visits in 2022 compared to 2019, the growth in visits from North American and Europe are a positive sign and indicate a continued appeal for travellers from these regions.

Visits (000s) by global region



INTERNATIONAL TOURISM PERFORMANCE IN 2022

About this data

All data is sourced from the International Passenger Survey by the Office for National Statistics. Refer to the [ONS website](#) for more on IPS methodology.

Important Notice On Continued Impact of COVID in relation to IPS Data Collection

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some seaports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [visitbritain.org](#) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see [visitbritain.org](#) for more information.

Please refer to the [ONS website](#) for the official release and more information on IPS methodology and UK outbound travel and for Full Year 2022 details are on this [ONS page](#).

INTERNATIONAL TOURISM PERFORMANCE IN 2022

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