



Insight Department



Whisky Tourism – Facts and Insights

March 2015



Welcome

The following paper is a brief overview of the Scottish Whisky industry and its importance in regards to Scottish Tourism. This paper has been compiled using a number of secondary sources as well as research conducted by VisitScotland.

The Year of Food and Drink Scotland 2015 is a Scottish Government initiative led in partnership by EventScotland, VisitScotland and Scotland Food & Drink. It offers the opportunity to spotlight, celebrate and promote Scotland's natural larder and in doing so, further develop Scotland's reputation as a Land of Food and Drink. In addition, the Food & Drink sector is fully acknowledged as a key part of the Tourism Scotland 2020 strategy.

Key Statistics

- Scotland has 5 distinct whisky regions, Highland, Speyside, Lowland, Islay, and Campbeltown, which all have unique characteristics and flavours that differentiate them.
- The whisky industry is recognised as the UK's largest single food and drink sector, which accounts for 25% of the UK's food and drink exports, and 80% of Scottish food and drink exports, impacting 200 markets worldwide.
- The whisky sector generates £3.3 billion directly to the UK economy, and totals £5 billion when Gross Value Added (GVA) is added to the overall to UK Gross Domestic Product (GDP).
- France and USA generate the greatest levels of volume and value in terms of exports of Scotch Whisky.
- Emerging markets such as Brazil, India, Mexico, and UAE have achieved overall growth between 2012 and 2013 in terms of both volume and value in exports.
- 20% of research participants of the Scotland Visitor Survey stated they visited a whisky distillery on their holiday, making it one of the top activities for overnight tourists on their trip to Scotland.
- 43% of visitors from Germany visited a whisky distillery whilst in Scotland, the 2nd most popular activity for visitors from this market.
- Visits to whisky distilleries is most popular with overseas visitors, who are usually first time visitors to Scotland.
- 1.1 million visits were recorded to distilleries in Scotland during 2013, a 10.5% increase on 2012's figures.



Source: VisitScotland & The Scottish Whisky Experience

Highland

By far the biggest region geographically, the Highland malts inevitably embrace wide and robust flavour variations. Generally heavier and drier in character compared to other regions, whiskies from here often have nutty, honey, heather or peaty notes. Distilleries near the sea also have some salty, maritime influences in their malts.

Speyside

The biggest region in terms of production, half of all Scottish distilleries can be found here. Speyside single malts are noted in general for their elegance and complexity, sometimes with a refined smokiness but more often a fruitiness ranging from ripe pears to sultanas

Lowland

There are only a handful of Lowland distilleries still operating, producing softer, lighter style single malts that are traditionally known as the 'Lowland Ladies'. Whiskies from here are known for their malty, zesty flavours with slightly fruity, citrusy and sometimes floral notes.

Islay

Pronounced "eye-luh", this is the greatest of whisky-producing islands. It is only 25 miles long, but has no fewer than eight distilleries. It's covered in peat which is exposed to rain and sea spray. Harvested and used to malt the barley used in distilling, the peat gives the single malts here their characteristic smoky flavour with some salty, seaweed notes.

Campbeltown

Campbeltown, the small coastal town at the tip of the Kintyre peninsula, once boasted over 30 local distilleries but now has just three. Nevertheless, they are still considered by serious malt lovers to represent a distinct region in their own right. Single malts produced here are noticeable for their briny character and some boast peaty notes

Economic Impact of Scotch Whisky

The iconic perception of whisky to Scotland stretches further than a export, the economic value of the product is vastly important to the Scottish economy and the tourism industry. A study by 4-Consulting with the Scotch Whisky Association illustrates the importance of the Scotch Whisky industry to both the Scottish and UK economies, identifying key economic outputs of the product.

- The sector generates £3.3 billion directly to the UK economy, and totals £5 billion when Gross Value Added (GVA) is added to the overall to UK Gross Domestic Product (GDP).
- Whisky producers spend £1.4 billion each year on Scottish suppliers.
- The whisky industry is recognised as the UK's largest single food and drink sector, which accounts for 25% of the UK's food and drink exports, and 80% of Scottish food and drink exports, impacting 200 markets worldwide.
- In terms of employment, the whisky industry supports 40,300 jobs directly and indirectly across the UK, and supports for further 2.7 jobs in the broader UK economy.
- Supports 7,400 jobs within the sector are within rural communities.
- Generates around £900 million of GVA and an estimated £250 million of income in rural communities.

Source: *The Economic Impact of Scotch Whisky Production in the UK*

Key Export Markets

Figures from the Scotch Whisky Association Statistical Report 2013 indicates that France and USA generate the greatest levels of volume and value in terms of exports of Scotch Whisky, with both showing growth on 2012's figures. Emerging markets such as Brazil, India, Mexico, and UAE have achieved overall growth between 2012 and 2013 in terms of both volume and value.

Top 20 Export Markets for Scotch Whisky in 2013							
Volume				Value			
Rank	Country	LPA	% Diff 2013/2012	Rank	Country	£ Sterling	% Diff 2013/2012
1	France	49,900,805	16	1	USA	818,726,847	8
2	USA	35,634,355	0	2	France	434,565,326	0
3	Singapore	18,706,098	4	3	Singapore	329,695,083	-3
4	India	17,112,809	4	4	Spain	180,088,857	-8
5	Brazil	16,236,016	26	5	Germany	172,227,141	2
6	Spain	16,090,677	-4	6	South Africa	163,455,523	1
7	South Africa	16,034,305	8	7	Taiwan	144,608,078	-13
8	Germany	14,708,556	0	8	South Korea	115,365,490	-15
9	Mexico	11,372,872	15	9	Mexico	109,751,499	19
10	Australia	8,443,750	14	10	Brazil	99,114,672	18
11	Poland	7,486,692	39	11	UAE	91,489,261	14
12	South Korea	6,572,668	-12	12	Australia	83,993,418	7
13	Thailand	6,522,267	-31	13	Latvia	79,955,572	1
14	Venezuela	6,032,301	-32	14	India	68,687,432	12
15	UAE	6,002,632	12	15	Venezuela	67,233,260	-34
16	Taiwan	5,471,220	-12	16	Canada	65,731,878	4
17	Latvia	5,091,399	29	17	Poland	59,658,715	38
18	Netherlands	4,873,012	-21	18	Japan	59,548,259	-15
19	China	4,682,234	-27	19	Panama	57,874,447	10
20	Italy	4,365,261	-3	20	Netherlands	55,868,614	-23

Source: *Scotch Whisky Association Statistical Report 2013*

A comprehensive mainland Scotland Visitor Survey was undertaken for VisitScotland by TNS during the summer of 2011 and 2012. The survey captured the views of overnight leisure holidaymakers in Scotland, including views on various aspects of their holiday experience.

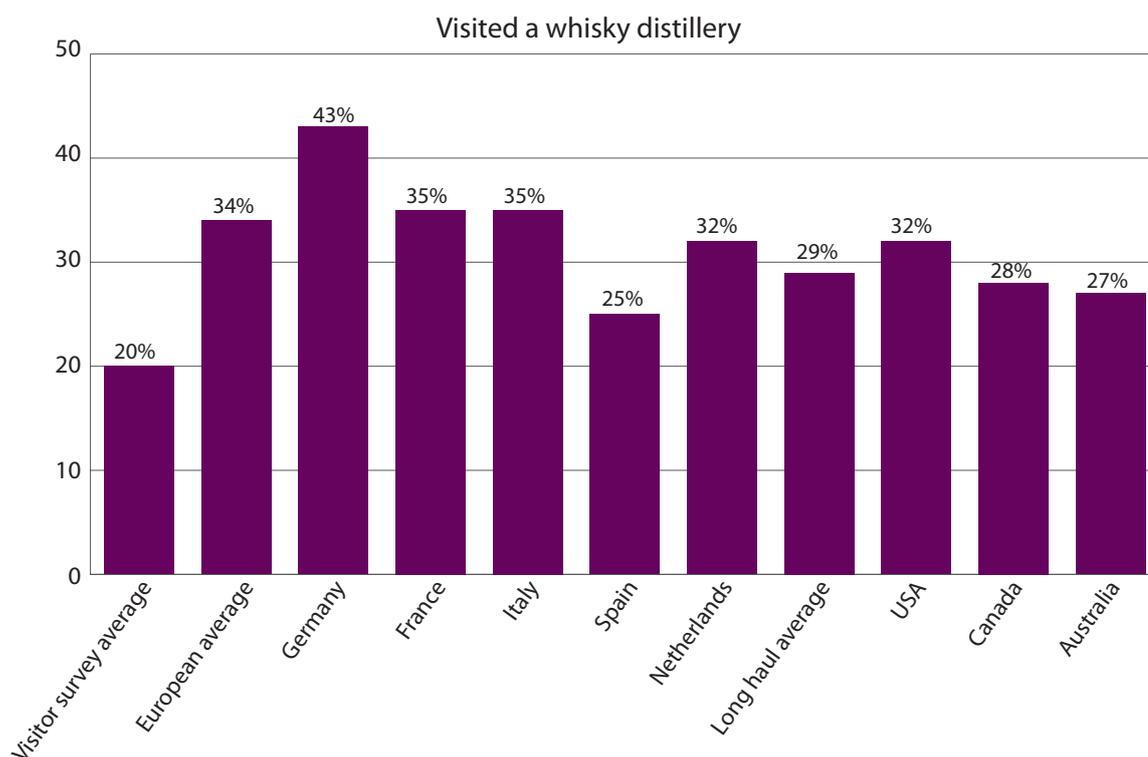
- 54% of UK research participants stated they enjoyed trying local specialty food and drink on their domestic holidays.
- 20% of research participants stated they visited a whisky distillery on their holiday, making it one of the top 20 activities for tourists to undertake on their trip to Scotland.
- Visitors from Germany have a higher propensity to visit a whisky distillery whilst in Scotland, achieving 43%, which is higher than a visitor survey average of 20%.
- 28% of visitors to Perthshire visited a whisky distillery on their trip.
- Visits to whisky distilleries are most popular with overseas visitors, who are usually first time visitors to Scotland.

Source: Scotland Visitor Survey 2011 & 2012

Demographic

Research from the Scotland Visitor Survey indicates visitors from Germany have the greatest interest in visiting whisky distilleries on their trip to Scotland, followed by other European markets such as France and Italy, which also rank higher than the European average. Visitors from USA are the highest ranking long haul market, which also rank higher than the long haul average.

“Did you take part in any of the following during this trip - Undertaken at all during your trip”



Source: Scotland Visitor Survey 2011 & 2012

Visitor Attractions Barometer

Visiting distilleries is one of the most popular types of visitor attractions in Scotland. There was 1.1 million visits recorded to distilleries in Scotland during 2013, a 10.5% increase on 2012's figures. Data also reveals that distilleries, breweries, and wineries also attract the greatest proportion of overseas visitors than any other visitor attraction throughout 2013. Figures from the Visitor Attractions Barometer also indicates that distilleries, breweries, and wineries also generate the highest average spend per trip by visitors, with £12.60, significantly higher than other visitor attraction types. Distilleries, breweries, and wineries also generate the highest figure for average total retail per attraction, with £624,161 in 2013.

The top 20 distilleries in Scotland account for 83% of the total visits to the sector throughout 2013, generating 979,494 visits, which was also a 16% increase on the same period in 2012. The Highlands of Scotland house the most distilleries per region with 30% of the top 20 distilleries in the country. However, The Scotch Whisky Heritage Centre in Edinburgh was the most popular whisky visitor attraction in Scotland during 2012 and 2013.

Top 20 Distilleries in Scotland by visits (2012-2013)	2013	2012	%13/12	Region
The Scotch Whisky Heritage Centre, Edinburgh	301,782	270,572	11.5	Edinburgh & Lothians
The Famous Grouse Experience, Crieff	85,304	89,236	-4.4	Perthshire
Glenfiddich Distillery, Dufftown	81,316	74,502	9.1	Aberdeen & Grampian
Glengoyne Distillery, nr Killearn	59,275	53,239	11.3	Argyll, Loch Lomond & The Forth Valley
Edradour Distillery, by Pitlochry	54,463	N/A	N/A	Perthshire
Blair Athol Distillery, Pitlochry	53,637	47,000	14.1	Perthshire
Talisker Distillery Visitor Centre, Carbost	51,967	51,314	1.3	Highlands of Scotland
Oban Distillery Visitor Centre, Oban	42,466	34,696	22.4	Argyll, Loch Lomond & The Forth Valley
Dalwhinnie Distillery, Dalwhinnie	32,598	22,862	42.6	Highlands of Scotland
Glenkinchie Distillery, Tranent	32,192	27,695	16.2	Edinburgh & Lothians
Dewar's World of Whisky, Aberfeldy	31,120	29,568	5.2	Perthshire
Legend of the Dew of Ben Nevis, Fort William	23,555	19,430	21.2	Highlands of Scotland
Glen Ord Distillery, Muir of Ord	20,340	17,888	13.7	Highlands of Scotland
Tomatin Distillery, Tomatin	20,043	21,176	-5.4	Highlands of Scotland
Glenmorangie Distillery, Tain	19,495	20,453	-4.7	Highlands of Scotland
Highland Park Distillery, Kirkwall	18,090	15,459	17	Orkney
Macallan Distillery, Craigellachie	15,297	11,949	28	Aberdeen & Grampian
Strathisla Distillery, Keith	14,254	14,545	-2	Aberdeen & Grampian
Royal Lochnagar Distillery Visitor Centre, nr Ballater	11,800	12,871	-8.3	Aberdeen & Grampian
Ardbeg Distillery, Port Ellen	10,500	8,619	21.8	Argyll, Loch Lomond & The Forth Valley
Total	979,494	843,074	16.1	

Source: Visitor Attractions Barometer

References

Moffat Centre Visitor Attractions Barometer

Scotch Whisky Association The Economic Impact of Scotch Whisky Production in the UK 2015

Scotch Whisky Association Statistical Report 2013

VisitScotland Scotland Visitor Survey 2011 & 2012

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March 2015

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