



## Tourism and the proposed Scottish Borders National Park

### **Question**

Might designation of a National Park within Scottish Borders bring an additional £100-200m into the region's economy, and up to 4000 additional jobs?

### **Tourism and National Parks**

In the UK National Parks are living places with diverse economies, a large proportion of which is agriculture and forestry. However an important component of their economies is tourism and much of this is due to the magnet of the 'National Park' label. A 2012 study by the UK Association of National Parks found that 90% of adults were aware of the term 'National Park' and 65% had visited one within the last year. Internationally the term also has positive associations for tourism. Consequently, NPs attract high visitor numbers and visitor spend. For example, Wales' NPs have over 12 million visitors per year which inject £1bn into the Welsh economy (Wales, 2013).

#### *The 'halo' effect*

In the UK and in a number of other countries including the USA, in addition to the substantial tourist spend within NP boundaries, considerably greater amounts are spent in the 'halo' around the Parks. This is especially the case in the 'gateway towns' which capture a much greater amount of tourist spend on accommodation, retail etc (SCNP, 2016). On its website the Director of the US National Parks Service states that for every \$1 spent by the Parks Service, \$10 are spent in the gateway towns by visitors.

#### *Tourism in Scottish Borders*

The visitor statistics for Scottish Borders are very depressing (see VisitScotland 2015, Appendix 1). Scottish Borders appears on the surface to have the characteristics of a desirable visitor destination. It has many tourism assets and facilities, with broad appeal in terms of outdoor activities, historic buildings, attractive settlements, beautiful landscapes and reasonable accessibility by car from both Scottish and English centres of population. However the statistics for tourism in Scottish Borders do not reflect the apparent appeal of these assets. According to SBC (STEAM 2014) visitor days and total employment supported by tourism declined slightly between 2009 and 2014, contrary the upward Scottish and UK trends in tourism.

The comparison with the rest of Scotland is also unfavourable. VisitScotland's analysis of tourism in 16 regions of Scotland in 2014 (VisitScotland 2015, see Appendix 1) compared a number of parameters of tourism statistics. Scottish Borders performed poorly across the board— for example behind Ayrshire and Arran, Fife Angus and Dundee. Only Orkney, Shetland and the Outer Hebrides, much further from international connections and the central belt of population, did worse on average. The position of Scottish Borders in the league of 16 regions was as follows :

|                        |                  |
|------------------------|------------------|
| GB tourist trips       | 13 <sup>th</sup> |
| GB tourist spend       | 13 <sup>th</sup> |
| Overseas tourist spend | 16 <sup>th</sup> |
| Overseas tourist trips | 16 <sup>th</sup> |

Briefly, Scottish Borders was at the bottom of the league for the Scottish Mainland.

## ***What is the problem?***

### *Lack of awareness*

The most obvious problem is that people in the outside world do not think ‘Scottish Borders’ when they are considering where to go on holiday, in the way they think ‘Scottish Highlands, Lake District’ etc. In other words, **Scottish Borders is not on the tourist radar**. It is not the case that Scottish Borders has a negative image. Indeed, those who do visit the Scottish Borders register a high level of satisfaction and often return.

However, for international and UK visitors the Scottish Borders as a whole has a very low profile as a visitor destination. It conjures up no image at all. This is borne out by the accounts of many tourism businesses in SB, some of which have individually built a reputation and get good repeat business entirely through their own efforts. However it is an uphill struggle for them to capture the attention of potential visitors and get that first visit. It is widely reported by them and by others that for small businesses, which most tourism-associated businesses are, there is no Borders tourism ‘Brand’ which identifies the region broadly as a place to consider as a vacation destination. This poses major problems for individual tourism businesses. They struggle to achieve favourable occupancy rates and are faced with low profit margins, short seasons and rising labour costs. It also discourages new tourist business creation and limits the income to businesses which receive indirect tourism-related income, e.g. construction trades, transport, retailing etc.

### *Decline in passing trade*

Another factor which may be affecting the tourism business is the downgrading of the A68 from trunk road status north of Carter Bar following advice to drivers, by successive UK Governments, to use the A1 in preference. This has led to a significant reduction in traffic volumes on this scenic route which, incidentally, enables through travellers to discover the beauties of the Borderlands for themselves. Recent research (A68, 2016) has found that the daily flow of cars through Jedburgh fell by 35% between 2004 and 2014. That is 1461 cars per day less and 534,000 fewer vehicles a year.

In spite of its outstanding scenery and the tremendous panoramic views of Southern Scotland from Carter Bar, the A68 is not included in VisitScotland’s list of twelve national tourist routes.

On the plus side, these dire tourism statistics suggest that there is an opportunity to grow tourism in the area if only the key to effective marketing can be found. There is no obvious reason why Scottish Borders should not enjoy at least as strong a tourism economy as other

parts of rural mainland Scotland. The challenge is to make it visible and attractive to the vast potential UK and international visitor market.

### ***What is the solution?***

No one solution will completely answer this question. However a key ingredient in the marketing strategy has to be the development of a Scottish Borders 'Brand' which conjures up a picture in the mind of potential visitors from all over the world, a picture which presents SB as a place to visit, preferably for several days, with the whole family, in spring, summer, autumn and the festive season.

VisitScotland (2012) found from a survey that the main motivator of 58% of visitors to Scotland was scenery/landscape :

#### *The landscape*

The Scottish Borders countryside is rich in readily accessible scenery from wild hill country to idyllic pastures and river valleys.

Although not immediately evident, there is a coherent identity to the topography. The line of the Cheviot summits is more or less the Border, from which wild uplands the land, moving northward, passes through decreasing rolling and occasional craggy moorlands and small glens to the wider valleys of the Teviot and Tweed. It is a gradual change that links the magnificent and massive range of the Cheviots to the more pastoral and agricultural lowland valley plains. No wonder the Romans pushed their famous road, Dere Street, north from York beyond the heights of the Carter Bar towards the Forth estuary when they saw the vast expanse of fertile land to the north of what is now the Border between Scotland and England. No wonder the beauty of the scenes has been celebrated in song, literature and visual arts through the centuries. No wonder visiting artists such as William Turner chose to execute some stunning, romantic landscape paintings and drawings here.

There is no dramatic change from mountain top to glacial valley floor as in the Highlands, rather a single, sinuous sweep of subtle variation from the natural habitat of rolling moorland, through ancient and less ancient woodlands, giving way slowly through hedged, fenced and walled pastures to the wide, open agricultural bread-basket of The Merse. The visual connection is a two-way delight: panoramic views from the highest points, across the foothills to the valleys, glens and plains are complemented by the reverse view from riversides and their cultivated former flood plains up to the distant hills, all under a unifying arc of 'big sky'.

#### *The cultural heritage*

The second most important motivator of visitors to Scotland, according to the same VisitScotland survey (2012) was to learn more about the history/culture of Scotland.

This part of the Borders is steeped in **cultural heritage** from earliest times to the present day. Most of the hill-tops show evidence of Iron Age settlement, giving a coherence to the uplands which was important to those early inhabitants since line of sight was vital for

communication and mutual defence. Roman activity is clearly demonstrated in sites such as Trimontium and Dere Street, while the border reiving and land disputes of medieval times and beyond gave rise to many a pele tower or fortified dwelling, built in positions commanding views of the surrounding countryside or near to water and land routes. Such positions, scenic in themselves, are thus significantly enhanced by the romance of the cultural landscape. The same is true of the positioning of the ruins of medieval abbeys, close by our great rivers, surrounded by farmland.

Many of these ancient buildings remain in some form (eg Hermitage, Smailholm, Bemersyde, Hume, Fatlips, plus the abbeys at Melrose, Dryburgh, Kelso and Jedburgh), and the stories and ballads to which these places and times gave rise have been preserved in oral and written tradition (not least by our most famous wordsmith Sir Walter Scott, the inventor of the 'historical novel'). Many remain known and celebrated today thanks in part to the spectacular Common Ridings. That literary heritage is also kept alive by, inter alia, the SBC Library Service and Heritage Hub, the internationally successful annual Borders Book Festival, held in Melrose, and the prize-winning independent bookshop in St Boswells: The Main Street Trading Company.

The stately homes of Floors Castle, Makerstoun and Monteviot are set in designed landscapes close to the great Tweed and Teviot rivers, where today salmon anglers from all over the world come to sample the excellent sport. These rivers themselves of course gave rise to the thriving woollen and tweed industry, now seen only in smaller, high-end mills which nevertheless, along with the Textile Museum in Scotland, attract tourists to their visitor centres.

### *Living traditions*

The unique Common Riding festivals (not wholly restricted to the proposed area, but most prevalent there) constitute a living remembrance of times past, and yet have a continuing relevance today and tomorrow through the way in which they instil civic pride, community spirit and connectivity *across* every age-group and, despite healthy rivalry, *between* the towns and communities around which they are held. They make a splendid spectacle for visitors to the region.

Horses have continued to play an important part in the Borders cultural heritage outside and alongside the common ridings. Equestrian sport is a passion for a disproportionately high number of the population. From breeding and training horses for national hunt racing, eventing and show-jumping, to hosting those events and sending our riders and horses across the world to compete, the Borders and Borderers are synonymous with success.

And the Borders Festival of The Horse, initiated locally to help the region bounce back after the devastation of the foot and mouth outbreak, has grown every year since its inception in 2001.

With 350km of horse trails in the Borders, the area is a popular equestrian destination all year round. To make life easier for visitors there's also a B&B service for horses and ponies. The five-star Horses Welcome initiative successfully established under the guiding hand of the British Horse Society (Borders) now offers 10 quality assured stops.

Culturally significant is the other great Borders sport of rugby, and the birthplace of sevens rugby at the Greenyards in Melrose still attracts thousands of visitors and players annually from all over the world. More ancient still, since probably originating from the Norman invasion, are the hand ba' games still held in Borders towns like Jedburgh, Ancrum and Denholm - games remarkably similar to some held in France, Italy and the Orkney Isles.

### *Raising awareness*

So, the Scottish Borders has an abundance of beautiful landscapes and scenery, and is steeped in history and culture. Many of the specific locations are visitor attractions, but as noted above there is little external awareness of them.

Each is on too small a scale to act as a stand-alone magnet for the kind of substantial increase in tourist numbers which would have a beneficial effect on the Borders. There is no overarching focus with which all the attractions, facilities and activities can associate to create a major, overall image of SB as an outstanding place to go on holiday. The landscape is already in place, but most of it is unprotected; the other attractions and facilities largely exist already: all that is required is a more coherent profile and publicity effort.

A Borders National Park would go a long way towards providing such a focus. With proper marketing (including a good website on which all SB businesses could advertise, and good social media exposure) it could enhance awareness of all SB-based visitor attractions, within and beyond the area of the National Park. Importantly, the occasion of designation of a National Park would attract a huge amount of media interest, nationally and internationally. This would cost nothing and provide a major opportunity to raise awareness of the whole region and its appeal as an outstanding place to visit.

### ***The appeal of the 'National Park' label***

'National Park' is an internationally understood label which conjures up visions of beautiful places, high levels of visitor facilities and general attractiveness :

'The National Parks are amongst the most valuable tourism brands in Wales, they give a level of visibility to both domestic and international visitors that other parts of Wales cannot achieve' (Wales, 2013).

A survey (SCNP 2016) of a number of national tourism websites shows how some countries use their National Parks to promote tourism – Destination Canada, New Zealand, Chile, Kenya, Visit Britain. (SCNP, 2015). Stokke et al (2011) in a study of NPs in Norway found that NPs have a great appeal for German, Danish and Dutch motor tourists and that 40% of foreign tourists' expenditures could be directly attributed to the NP status of the areas. An Australian report (Lindberg & Denstadt, 2004) concluded that 50% of spending in the Queensland NPs was induced by the existence of the Park and that half of the visitors would not have come if the area was not an NP .

In the highly competitive world of international tourism the NP label catches the attention. It encourages further enquiry into the NP and its environs as a holiday destination. In 2012

the UK Association of National Park Authorities published a study based on 1800 telephone interviews. It showed that –

- 90% had heard the term 'National Park'.
- 89% thought NPs were important to them
- 65% had visited a NP in the last year
- 30% had visited NPs three or more times.

### *Would the designation of a specific area damage tourism in the surrounding areas?*

The evidence from tourist behaviour in the vicinity of NPs in the UK and elsewhere is of the reverse effect. Visitors show little awareness of whether they are staying within or outside the NP. The benefits extend well beyond the NP boundaries into the surrounding 'halo'. The owner of Hammet House located outside the Snowdonia NP boundary says "Customers tend to regard the whole of Pembrokeshire as the NP so its reputation benefits Pembrokeshire as a whole (Wales, 2013). This experience is repeated in the English National Parks, as attested by reports and case studies posted on their websites.

### *Impact on tourism numbers, spend and employment*

Considering more specifically the area of the Southern Borders proposed for designation, there is an abundance of research to draw on to estimate the impact that designation might have on tourism.

Studies of the economic impact of National Parks in the UK and overseas show that National Parks attract more visitors, increase average visitor spend and lengthen the visitor season (Mayhew, 2013; SCNP, 2016; Council for National Parks, 2006; Campaign for National Parks, 2010; LL&T, 2011; Wales, 2013; England, (2013) and many others.

Looking closer to home at visitor numbers and spend in NPs, Cairngorms NP, designated in 2003, saw visitor numbers of 1.5m in 2015 with an average spend of £87.40 per person/day (cairngorms.co.uk), and totalling £185m in 2009 (nationalparks.gov.uk). Loch Lomond & Trossachs, operational from 2002, saw visitor spend of £115m in 2005 rise to £190m in 2009 with 4m visitors (LL&T, 2011; national parks.gov.uk). Northumberland National Park, designated in 1956, had 1.5m visitors who spent £190m in 2014 (nationalparks.gov.uk).

What might the figures look like for Scottish Borders? Unfortunately different studies have calculated the figures in different ways, and so we do not have fully comparable 'before and after' figures for UK and Scottish NPs. Accordingly it is necessary to be very conservative in any predictions and to recognise these limitations. Nevertheless there are relevant, recent figures on Scottish tourism on which to base predictions. Scottish Borders would be starting from a very low base, at the bottom of the league of Scotland's mainland regions. If, for example, the designation of a National Park in Scottish Borders led over a few years to a doubling of visitor numbers and visitor spend in the region – the National Park plus the surrounding area - it would still only be equal to Dumfries and Galloway, second bottom in the league of Scottish mainland regions (VisitScotland 2015). This looks like an achievable position. It would, however, have a significant economic impact.

VisitScotland and SBC have used different methodologies in calculating tourism statistics so their figures are not directly comparable. If we take SBC's STEAM figures for 2014 (STEAM 2014), a doubling of tourism would equate to £187.44m **additional** visitor annual spend, 3774 **additional** FTE jobs and 4572 total **additional** jobs if indirect impact is included. VisitScotland's figures for tourist trips and tourist spend are significantly lower than SBC's (see Appendix 1). However the figure of £187.44m is close to the figure of £190m for nearby Northumberland National Park (nationalparks.gov.uk 2014): a fact which tends to support it as a modest and reasonable prediction. Northumberland NP has an area of 1030 km<sup>2</sup> compared with 1375 km<sup>2</sup> of the proposed Scottish Borders NP. The predicted growth in tourism and visitor spend made here is for the whole of Scottish Borders, not just the proposed National Park area.

#### *How well could Scottish Borders cope with a doubling of visitor numbers?*

National Park designation does not just increase visitor attractiveness. It extends the visitor season at both ends and increases out of season short visits. Hence existing tourism businesses can gain additional income during periods when they currently have little or none. In this way their fixed costs can be spread over a longer period of income generation. The same goes for transportation. A doubling of tourist numbers increases pressure in peak periods, but does not double it. Rather it increases utilisation and income by extending the vacation season.

Nor does Scottish Borders suffer at present from congestion and overcrowded facilities. The current provision could easily absorb a substantial increase in use. In addition there is every reason to believe that the private sector would welcome the opportunity to expand provision.

In conclusion, it is not unrealistic to predict that National Park designation and the accompanying publicity would lead to a very significant increase in visitor numbers and tourism spend, possibly as much as a doubling, without creating an undesirable level of pressure on facilities. This would have a significant positive impact on the local economy.

#### *Note :-*

In this section we have only considered the impact on tourism. We have not considered the direct income to the National Park authority, and a range of other socioeconomic benefits which would accompany designation. These will be discussed in a series of briefings which will be posted on the website over the next few months.

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## Appendix 1

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### GB Tourist Spend

| GB Tourist Spend by country of residence (£m) |              |                     |                |            |                  |                     |                        |            |                                |            |            |                 |           |                |            |                  |           |
|---|--------------|---------------------|----------------|------------|------------------|---------------------|------------------------|------------|--------------------------------|------------|------------|-----------------|-----------|----------------|------------|------------------|-----------|
| Country of residence                          | Scotland     | Aberdeen & Grampian | Angus & Dundee | AILLST     | Ayrshire & Arran | Dumfries & Galloway | Edinburgh and Lothians | Edinburgh  | Greater Glasgow & Clyde Valley | Glasgow    | Highlands  | Kingdom of Fife | Orkney    | Outer Hebrides | Perthshire | Scottish Borders | Shetland  |
| Scotland                                      | 1,170        | 134                 | 44             | 142        | 86               | 36                  | 148                    | 125        | 159                            | 139        | 202        | 39              | 7         | 21             | 92         | 22               | 34        |
| England                                       | 1,608        | 115                 | 30             | 170        | 38               | 75                  | 395                    | 369        | 318                            | 280        | 249        | 52              | 18        | 14             | 53         | 35               | 17        |
| Wales   | 93           | 2                   | 3              | 13         | -                | 4                   | 25                     | 19         | 28                             | 23         | 8          | -               | -         | 7              | -          | 2                | -         |
| <b>Total GB</b>                               | <b>2,871</b> | <b>250</b>          | <b>76</b>      | <b>325</b> | <b>124</b>       | <b>116</b>          | <b>569</b>             | <b>513</b> | <b>505</b>                     | <b>442</b> | <b>460</b> | <b>91</b>       | <b>25</b> | <b>43</b>      | <b>145</b> | <b>59</b>        | <b>51</b> |

Source: GBTS

### GB Tourist Trips

| GB Tourist Trips by country of residence (000s) |               |                     |                |              |                  |                     |                        |              |                                |              |              |                 |           |                |            |                  |           |
|---|---------------|---------------------|----------------|--------------|------------------|---------------------|------------------------|--------------|--------------------------------|--------------|--------------|-----------------|-----------|----------------|------------|------------------|-----------|
| Country of residence                            | Scotland      | Aberdeen & Grampian | Angus & Dundee | AILLST       | Ayrshire & Arran | Dumfries & Galloway | Edinburgh and Lothians | Edinburgh    | Greater Glasgow & Clyde Valley | Glasgow      | Highlands    | Kingdom of Fife | Orkney    | Outer Hebrides | Perthshire | Scottish Borders | Shetland  |
| Scotland  | 6,516         | 787                 | 228            | 848          | 607              | 329                 | 871                    | 693          | 949                            | 807          | 993          | 324             | 32        | 72             | 552        | 140              | 51        |
| England   | 5,569         | 428                 | 169            | 577          | 222              | 306                 | 1,571                  | 1,382        | 1,349                          | 1,176        | 663          | 249             | 31        | 36             | 189        | 178              | 34        |
| Wales   | 435           | 13                  | 11             | 73           | -                | 28                  | 153                    | 134          | 229                            | 142          | 6            | -               | -         | 6              | -          | 11               | -         |
| <b>Total GB</b>                                 | <b>12,519</b> | <b>1,228</b>        | <b>408</b>     | <b>1,498</b> | <b>829</b>       | <b>663</b>          | <b>2,594</b>           | <b>2,208</b> | <b>2,527</b>                   | <b>2,126</b> | <b>1,662</b> | <b>573</b>      | <b>64</b> | <b>114</b>     | <b>738</b> | <b>329</b>       | <b>85</b> |

Source: GBTS

# Overseas Tourist Spend

| Overseas Tourist Spend (£m) |              |                |           |           |           |                  |                     |                           |            |                                |            |                     |            |           |                 |                           |            |                           |            |                  |
|-----------------------------|--------------|----------------|-----------|-----------|-----------|------------------|---------------------|---------------------------|------------|--------------------------------|------------|---------------------|------------|-----------|-----------------|---------------------------|------------|---------------------------|------------|------------------|
| Country of residence        | SCOTLAND     | Angus & Dundee | ALLST     | Argyll    | LLST      | Ayrshire & Arran | Dumfries & Galloway | Grampian (incl. Aberdeen) | Aberdeen   | Greater Glasgow & Clyde Valley | Glasgow    | Highlands & Islands | Highlands  | Islands   | Kingdom of Fife | Lothian (incl. Edinburgh) | Edinburgh  | Lothian (excl. Edinburgh) | Perthshire | Scottish Borders |
| USA                         | 436          | 4              | 23        | 18        | 5         | 16               | 1                   | 36                        | 25         | 40                             | 38         | 59                  | 36         | 23        | 34              | 175                       | 167        | 8                         | 47         | <1               |
| Germany                     | 174          | <1             | 10        | 6         | 4         | 2                | 2                   | 11                        | 6          | 16                             | 14         | 35                  | 26         | 9         | 17              | 73                        | 69         | 4                         | 4          | 1                |
| France                      | 110          | 1              | 8         | 2         | 6         | 3                | -                   | 12                        | 9          | 8                              | 6          | 21                  | 17         | 4         | 2               | 51                        | 49         | 2                         | 4          | -                |
| Australia                   | 130          | 1              | 3         | 2         | 1         | 4                | 14                  | 7                         | 5          | 28                             | 23         | 15                  | 9          | 6         | 2               | 48                        | 45         | 4                         | 4          | 2                |
| Netherlands                 | 80           | 1              | 6         | 3         | 3         | <1               | <1                  | 8                         | 6          | 7                              | 6          | 20                  | 17         | 4         | 2               | 24                        | 22         | 2                         | 4          | 5                |
| Poland                      | 45           | <1             | 3         | <1        | 2         | <1               | -                   | 7                         | 6          | 9                              | 9          | 3                   | 1          | 2         | 1               | 22                        | 22         | 1                         | <1         | <1               |
| Norway                      | 68           | <1             | 2         | <1        | 2         | -                | -                   | 28                        | 25         | 4                              | 4          | 1                   | 1          | <1        | 1               | 28                        | 28         | -                         | 4          | -                |
| Canada                      | 88           | 5              | 14        | 2         | 12        | 3                | <1                  | 5                         | 3          | 18                             | 14         | 14                  | 10         | 4         | 2               | 23                        | 21         | 1                         | 3          | 2                |
| Irish Republic              | 28           | <1             | <1        | <1        | 1         | <1               | 2                   | <1                        | 1          | 5                              | 4          | <1                  | <1         | -         | <1              | 18                        | 18         | <1                        | <1         | <1               |
| Spain                       | 97           | -              | 2         | 1         | 1         | <1               | -                   | <1                        | 1          | 9                              | 8          | 6                   | 4          | 1         | 8               | 68                        | 68         | <1                        | 3          | -                |
| Rest of world               | 584          | 14             | 20        | 11        | 8         | 8                | 6                   | 57                        | 46         | 146                            | 119        | 62                  | 46         | 16        | 20              | 225                       | 217        | 5                         | 29         | 1                |
| <b>Total Overseas</b>       | <b>1,840</b> | <b>29</b>      | <b>92</b> | <b>46</b> | <b>45</b> | <b>37</b>        | <b>26</b>           | <b>172</b>                | <b>133</b> | <b>290</b>                     | <b>245</b> | <b>236</b>          | <b>167</b> | <b>68</b> | <b>90</b>       | <b>755</b>                | <b>726</b> | <b>28</b>                 | <b>103</b> | <b>12</b>        |

# Overseas Tourist Trips

| Overseas Tourist Trips (000s) |              |                |            |            |            |                  |                     |                           |            |                                |            |                     |            |            |                 |                           |              |                           |            |                  |
|-------------------------------|--------------|----------------|------------|------------|------------|------------------|---------------------|---------------------------|------------|--------------------------------|------------|---------------------|------------|------------|-----------------|---------------------------|--------------|---------------------------|------------|------------------|
| Country of residence          | SCOTLAND     | Angus & Dundee | ALLST      | Argyll     | LLST       | Ayrshire & Arran | Dumfries & Galloway | Grampian (incl. Aberdeen) | Aberdeen   | Greater Glasgow & Clyde Valley | Glasgow    | Highlands & Islands | Highlands  | Islands    | Kingdom of Fife | Lothian (incl. Edinburgh) | Edinburgh    | Lothian (excl. Edinburgh) | Perthshire | Scottish Borders |
| USA                           | 418          | 12             | 57         | 41         | 19         | 12               | 10                  | 29                        | 15         | 103                            | 98         | 110                 | 96         | 59         | 35              | 308                       | 307          | 3                         | 31         | 1                |
| Germany                       | 343          | 6              | 40         | 20         | 20         | 8                | 7                   | 43                        | 29         | 73                             | 63         | 100                 | 88         | 37         | 34              | 238                       | 227          | 15                        | 14         | 5                |
| France                        | 190          | 7              | 43         | 9          | 36         | 10               | -                   | 27                        | 21         | 24                             | 19         | 63                  | 56         | 33         | 5               | 111                       | 109          | 3                         | 13         | -                |
| Australia                     | 158          | 2              | 11         | 7          | 5          | 5                | 3                   | 12                        | 8          | 47                             | 39         | 36                  | 29         | 12         | 5               | 96                        | 94           | 3                         | 5          | 10               |
| Netherlands                   | 149          | 7              | 21         | 12         | 10         | 2                | 3                   | 18                        | 12         | 37                             | 32         | 46                  | 41         | 16         | 6               | 70                        | 66           | 5                         | 15         | 6                |
| Poland                        | 138          | 4              | 7          | 2          | 5          | <1               | 2                   | 18                        | 15         | 48                             | 47         | 10                  | 8          | 2          | 2               | 59                        | 51           | 8                         | 3          | 1                |
| Norway                        | 125          | 1              | 3          | <1         | 2          | -                | -                   | 52                        | 45         | 15                             | 13         | 3                   | 3          | 16         | 5               | 47                        | 47           | -                         | 7          | -                |
| Canada                        | 122          | 8              | 31         | 17         | 14         | 6                | <1                  | 12                        | 7          | 47                             | 41         | 35                  | 31         | 11         | 10              | 71                        | 70           | 5                         | 8          | 6                |
| Irish Republic                | 113          | 1              | 5          | 2          | 3          | 4                | 6                   | 6                         | 6          | 26                             | 24         | 1                   | 1          | -          | <1              | 62                        | 61           | <1                        | 3          | 1                |
| Spain                         | 101          | -              | 11         | 7          | 4          | 1                | -                   | 5                         | 3          | 24                             | 22         | 23                  | 22         | 8          | 20              | 68                        | 68           | <1                        | 10         | -                |
| Rest of world                 | 843          | 28             | 77         | 47         | 31         | 15               | 17                  | 101                       | 80         | 253                            | 224        | 158                 | 117        | 61         | 37              | 493                       | 487          | 13                        | 80         | 2                |
| <b>Total Overseas</b>         | <b>2,700</b> | <b>77</b>      | <b>306</b> | <b>165</b> | <b>149</b> | <b>64</b>        | <b>49</b>           | <b>323</b>                | <b>241</b> | <b>697</b>                     | <b>622</b> | <b>584</b>          | <b>492</b> | <b>255</b> | <b>158</b>      | <b>1,623</b>              | <b>1,587</b> | <b>56</b>                 | <b>191</b> | <b>34</b>        |

Source: IPS

