Executive Summary
Key Facts and Trends

This factsheet provides the latest data on the volume and value of visitors from the International Passenger Survey (IPS). 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.

Due to the relatively low annual sample sizes for visitors to Scotland from Italy, 3-year average figures have been calculated to allow for more accurate comparison of recent and historical data (pages 7 and 8), and to provide a more robust basis for analysis of detailed data such as regional visits and purpose of travel (pages 3 and 6). Some top-level 2019 figures have been provided on pages 3, 4, 5 and 9 to keep this publication consistent with other international factsheets published on visitscotland.org. While these can be useful, it is recommended to refer to the 3-year average figures on pages 7 and 8 when analysing size and trends of the market.

Figures suggest that in 2019 visitors from Italy decreased significantly from 2018 which caused smaller but still considerable drop in visitor expenditure. Despite that, Italy remained one of Scotland’s top ten international source markets measured by both number of trips and spend.

3-year average data indicates that in 2017-2019 market performance was very similar to the one in 2016-2018. Annual average number of visits was 186,000 and associated tourism expenditure just under £100 million. In recent years Italian residents find Scotland an increasingly attractive destination, with trips going up by 80% from 2014-2016 to 2017-2019.

Italians visit Scotland mostly during the first and the third quarter of the calendar year; combined, they account for 75% of all trips in 2017-2019. Two in three trips are made by holidaymakers and one in five by travellers visiting friends or relatives. Most tourists stay in Scotland less than a week which is typical for short-haul European visitors. Italy is one of Scotland’s youngest tourism source markets in terms of visitors’ age – half of all travellers are 34-years-old or younger.
Latest Information
Visitors from Italy to Scotland

Key Figures Overview, 2019

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2019</th>
<th>% Change 2018/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Scotland</td>
<td>122,000</td>
<td>-59%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>1,072,000</td>
<td>-21%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£85,929,000</td>
<td>-30%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>8.8 nights</td>
<td>+93%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£80</td>
<td>-12%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£705</td>
<td>+71%</td>
</tr>
</tbody>
</table>

Source: IPS, 2019. Figures based on relatively low sample size. It is recommended to refer to the 3-year average figures on page 7.

Duration of Stay

- 1-3 nights (31%)
- 4-7 nights (47%)
- 8-14 nights (16%)
- 15+ nights (6%)

Purpose of Travel

- Business (12%)
- Holiday (66%)
- VFR* (20%)
- Other (2%)

Seasonality

- Jan-Mar (31%)
- Apr-Jun (17%)
- Jul-Sep (34%)
- Oct-Dec (18%)

Age

- 16-24 (12%)
- 25-34 (38%)
- 35-44 (17%)
- 45-54 (22%)
- 55-64 (9%)
- 65+ (2%)

All charts are based on 3-year average data (2017-2019); * VFR = Visiting friends or relatives. Source: IPS.
# International Tourism Figures

## Top 10 Overseas Markets

Visitors from Italy Compared to Other Overseas Markets:

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips</th>
<th>Spend</th>
<th>Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000s</td>
<td>£m</td>
<td>000s</td>
</tr>
<tr>
<td></td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>USA</td>
<td>636</td>
<td>717</td>
<td>4,246</td>
</tr>
<tr>
<td>Germany</td>
<td>322</td>
<td>196</td>
<td>2,228</td>
</tr>
<tr>
<td>France</td>
<td>222</td>
<td>135</td>
<td>1,723</td>
</tr>
<tr>
<td>Netherlands</td>
<td>182</td>
<td>95</td>
<td>1,210</td>
</tr>
<tr>
<td>China*</td>
<td>172</td>
<td>142</td>
<td>2,047</td>
</tr>
<tr>
<td>Australia</td>
<td>148</td>
<td>146</td>
<td>1,706</td>
</tr>
<tr>
<td>Ireland</td>
<td>146</td>
<td>60</td>
<td>475</td>
</tr>
<tr>
<td>Spain*</td>
<td>128</td>
<td>51</td>
<td>915</td>
</tr>
<tr>
<td>Canada</td>
<td>125</td>
<td>92</td>
<td>1,023</td>
</tr>
<tr>
<td>Italy*</td>
<td>122</td>
<td>86</td>
<td>1,072</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,257</td>
<td>818</td>
<td>10,741</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>3,460</td>
<td>2,538</td>
<td>27,385</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>%</th>
<th>%</th>
<th>%</th>
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</thead>
<tbody>
<tr>
<td>Trips</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spend</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nights</td>
<td></td>
<td>39%</td>
<td></td>
</tr>
</tbody>
</table>

Source: IPS, 2019. Figures may not sum up due to rounding. *Figures based on lower sample sizes.
Inbound Tourism | UK & Scotland
Visitors from Italy

Trips of Italian Residents to the UK and Scotland: Total and Average Figures, 2019

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>Total visits</td>
<td>2,197,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>49% Holiday</td>
</tr>
<tr>
<td></td>
<td>26% VFR</td>
</tr>
<tr>
<td></td>
<td>18% Business</td>
</tr>
<tr>
<td></td>
<td>7% Other</td>
</tr>
<tr>
<td>Total nights</td>
<td>12,715,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£1,107,454,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>5.8 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£87</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£504</td>
</tr>
</tbody>
</table>

Source: IPS. Figures may not sum up due to rounding.
*3-year average (2017-2019).

Italian residents made 2.2 million visits to the UK in 2019, a 6% increase from 2018. Expenditure rose by £207 million, or 23% over the same period. Roughly half of all visits were holiday trips, and a quarter VFR trips.

Annual figures suggest a big year-on-year decrease in Italian visits to Scotland (-59%), with an associated drop of 30% in tourism spend. It is important to note that these figures are based on low sample sizes which reduce data reliability, and that visitor figures for 2018 were unprecedentedly high. For these reasons, it is recommended to use the 3-year average figures provided on pages 7 and 8 when analysing market performance in recent years.

Despite the decrease in visitors, Italy remained one of Scotland’s key tourism markets in 2019. The country was among Scotland’s top ten international source markets for number of visits, nights and total tourism expenditure. The share of holiday trips between 2017 and 2019 was much higher in Scotland (66%) than in the UK overall (49%).

In 2019, Italy was

The UK’s
• 6th largest source market measured by number of visits
• 7th largest by number of nights
• 6th largest by expenditure

Scotland’s
• 10th largest international source market measured by number of visits
• 8th largest by number of nights
• 8th largest by expenditure

Source: IPS, 2019.
Popular Destinations
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

Edinburgh & Lothians  Greater Glasgow & Clyde Valley  Highlands & Islands

Holidaymakers from Italy tend to visit mainly high-profile tourist destinations. Edinburgh & Lothians, Greater Glasgow & Clyde Valley and the Highlands & Islands traditionally remained the most popular regions in 2017-2019. Figures suggest that over the same period Italy was the fifth largest international source market in Argyll & the Isles.

Due to International Passenger Survey’s (IPS) methodology in the collection and publishing of tourist data, the flow of overseas visitors within Scotland is analysed at a regional level. Small sample sizes for visitors from Italy make regional analysis possible only for the top three regions listed above. Each of these consists of council areas as follows:

Edinburgh & the Lothians = City of Edinburgh, East Lothian, Midlothian, West Lothian;
Greater Glasgow, Clyde Valley = East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire;
Highlands & Islands = Highland, Na h-Eileanan Siar, Orkney Islands, Shetland Islands.
Visitors from Italy to Scotland
Historical Trend Information | 2009/11 – 2017/19

The 2017-2019 period was nearly identical to the 2016-2018 one in terms of both the volume and value of inbound tourism from Italy to Scotland. When analysing historical performance of the market, we can observe that the number of trips was slowly but steadily decreasing between 2009-2011 and 2013-2015, after which it rose rapidly. At 186,000, annual average visits in 2017-2019 were 80% higher than they were in 2014-2016. While this is mostly driven by the exceptionally strong 2018, other recent years also indicate an increase in Italian visitors. Growth in tourism expenditure has been more gradual but also notablesince 2013-2015.

Inbound Tourism Volume and Value Trend, 3-Year Annual Average Figures (2009/11-2017/19)

Source: IPS.

Total Visits, Nights & Spend, 3-Year Annual Average Figures (2009/11-2017/19)

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Total Visits (000s)</td>
<td>123</td>
<td>119</td>
<td>115</td>
<td>110</td>
<td>103</td>
<td>103</td>
<td>121</td>
<td>187</td>
<td>186</td>
</tr>
<tr>
<td>Total Nights (000s)</td>
<td>1,062</td>
<td>1,005</td>
<td>729</td>
<td>836</td>
<td>795</td>
<td>877</td>
<td>893</td>
<td>1,059</td>
<td>1,123</td>
</tr>
<tr>
<td>Total Spend (£m)</td>
<td>71</td>
<td>74</td>
<td>63</td>
<td>71</td>
<td>65</td>
<td>78</td>
<td>82</td>
<td>99</td>
<td>98</td>
</tr>
</tbody>
</table>

Source: IPS.
Average Italian Visit

Historical Trend Information | 2009/11 – 2017/19

The average length of stay of Italian visitors in 2017-2019 was **six nights**, a small increase from 5.7 nights in 2016-2018. The historical trend indicates that Italian tourists are spending **less time** in Scotland than they used to several years ago, with average length of stay dropping from 8.5 nights in 2014-2016. Average spend per visit declined correspondingly by 30% from the record-high £752 in 2014-2016 to **£528** in 2016-2018 and remained the same in 2017-2019. The rise in visitor numbers was significant enough to offset these decreases and lead to **growth in total nights and total expenditure**.

**Average Length of Stay and Spend Trend, 3-Year Annual Average Figures (2009/11-2017/19)**

![Graph showing average length of stay and spend trend](image)

Source: IPS.

**Average Length of Stay, Daily and Trip Spend, 3-Year Annual Average Figures (2009/11-2017/19)**

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<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Length of Stay (Nights)</strong></td>
<td>8.7</td>
<td>8.4</td>
<td>6.3</td>
<td>7.6</td>
<td>7.7</td>
<td>8.5</td>
<td>7.4</td>
<td>5.7</td>
<td>6.0</td>
</tr>
<tr>
<td><strong>Average Spend per Day (£)</strong></td>
<td>67</td>
<td>73</td>
<td>86</td>
<td>84</td>
<td>82</td>
<td>88</td>
<td>92</td>
<td>93</td>
<td>87</td>
</tr>
<tr>
<td><strong>Average Spend per Visit (£)</strong></td>
<td>578</td>
<td>618</td>
<td>544</td>
<td>639</td>
<td>634</td>
<td>752</td>
<td>681</td>
<td>528</td>
<td>528</td>
</tr>
</tbody>
</table>

Source: IPS.
Outbound Tourism
Visitors to Italy

Trips and Spend of UK and Scottish Residents in Italy, 2019

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2019</th>
<th>% Change 2018/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>5,105,000</td>
<td>+18%</td>
</tr>
<tr>
<td>Scotland</td>
<td>360,000</td>
<td>+98%</td>
</tr>
<tr>
<td>Total spend in Italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£3,083,019,000</td>
<td>+18%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£289,203,000</td>
<td>+189%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£604</td>
<td>0%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£804</td>
<td>+46%</td>
</tr>
</tbody>
</table>

Source: IPS, 2019.

In 2019, Italy was the third most popular destination for both UK residents overall and Scotland residents in particular. Visits to Italy by UK travellers increased by 18% to exceed 5.1 million in total, while tourism expenditure went over £3 billion.

The average UK resident spent 7.2 nights in Italy which is typical for trips to Europe. Daily spent was above the European average at £84. More than two-thirds of all UK visits to Italy were made by holidaymakers, and 22% by people visiting friends or relatives. The number of business trips was over a third of a million, or 7% of all.

As a destination, Italy amounted to 5.5% of the total UK outbound tourism in terms of visits and 4.9% in terms of expenditure in 2019. Its share of Scotland’s overseas tourism was more significant, constituting 6.2% of all international trips undertaken by Scottish residents, and 7% of their total overseas spend.

Figures suggest that in 2019 trips by Scottish residents to Italy nearly doubled to reach 360,000. Total expenditure also increased massively to £289 million, adding up to an average spend per visit of £804.

In 2019, Italy was

The UK’s
- 3rd most popular destination measured by number of visits
- 4th by expenditure

Scotland’s
- 3rd most popular destination measured by number of visits
- 3rd by expenditure

Source: IPS, 2019.
Appendix

International Passenger Survey 2019

USING AND INTERPRETING STATISTICAL DATA
Sources: Data is sourced from the Office for National Statistics’ International Passenger Survey (IPS). Information about the survey can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section) or the Office for National Statistics website www.statistics.gov.uk/hub/index.html.

Sample Sizes: Analysis of sub-groups, such as trips by purpose or demographic group, relies on small 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: Anchor Close on the Royal Mile, Edinburgh
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