



Visit Scotland | *Alba*TM
**NEW ZEALAND
TOURISM POLICY
SCHOOL
APRIL 2025**

Rob Dickson – Director of Industry and Events

Agenda

- VisitScotland – what we do
- Scotland: who visits?
- Opportunities for 2025
- Driving growth in the Visitor Economy



Strategic Framework

Our Purpose

To drive the visitor economy growing its value to Scotland.

Our Vision

A vibrant and dynamic visitor economy, creating better places for people to live, work and visit.

Our Mission

Through strategic leadership and industry partnerships, lead, support and contribute to a globally competitive visitor economy, highlighting the benefits of tourism & events in delivering the very best for our visitors, our businesses, our people, our communities and our environment.



Activity Pillars

Stimulating & managing demand

Supporting tourism & events businesses

Working collaboratively with partners including community, destination & sector organisations

Enhancing our organisation insight, capability, planning & compliance

Supporting & enabling our people

Positioning VisitScotland

VisitScotland, Economic Growth Agency - growing the value of the visitor economy



Market
Development



Place
Development



Business and
Experience
Development

Attracting investment into Scotland and helping Scotland's businesses to export

Leveraging tourism and events as a force for good for all of Scotland's people and places

Building Scotland's international profile as a leading place to visit, live, work, study and do business

Ensuring data, insight and technology underpins everything we deliver

What Success Looks like

Outcome					
What it means for the...	industry	Spread of customers through the year and across Scotland	Increased yield from each visit (added value, extended stay, local spend, wraparound event itinerary)	Improved environmental footprint (supply chain, climate action, etc)	Improved end-to-end stakeholder experience (including suppliers, staff, visitors, communities)
	visitor	A range of sustainable experiences with year-round and regional interest	Value for money and extension of trip/experience	Considerate of environmental and local impact of travel decisions	Personally enriching, quality experiences
	community	A balance of visitors and events year-round	Increased spend felt locally per visitor	Conservation of our places – built and natural heritage, preservation of our local wildlife, nature and culture	Benefits of tourism and events felt locally (employment, infrastructure and economic return), positive engagement

Impact of our activity:



Spend

NEI since 2018/19

£187m Marketing (from CRM database)

£93m Business Events (Bid Fund)

£466m Events

£102m Route Development



Spread

£18.9m Rural Tourism Infrastructure Fund monies administered to 75 projects across rural Scotland, leveraging £15.2m in additional investment



Sustainability

550% decrease in VS emissions since 2009 (3250 to 500 tonnes CO2)



Satisfaction

71% of visitors rated their holiday in Scotland as either 10/10 (48%) or 9/10 (23%)

Spend

Average additional nights (with associated spend) spent in Scotland due to VS influence:

6 additional nights from long haul visitors

4 from short haul visitors

4 from rest of UK visitors

Spread

VS influence on long haul (short haul) visitors:

31% visited a place not previously considered (SH: 18%)

34% visited more places than planned (SH: 34%)

25% visited in low season (SH: 24%)

Sustainability

'Very positive' industry feedback on VS net zero business resources (independent research April 2024)

Satisfaction

9.04 (out of 10) Average score for the likelihood of all visitors recommending Scotland as a holiday or short break destination (67% gave the highest possible score 10/10)

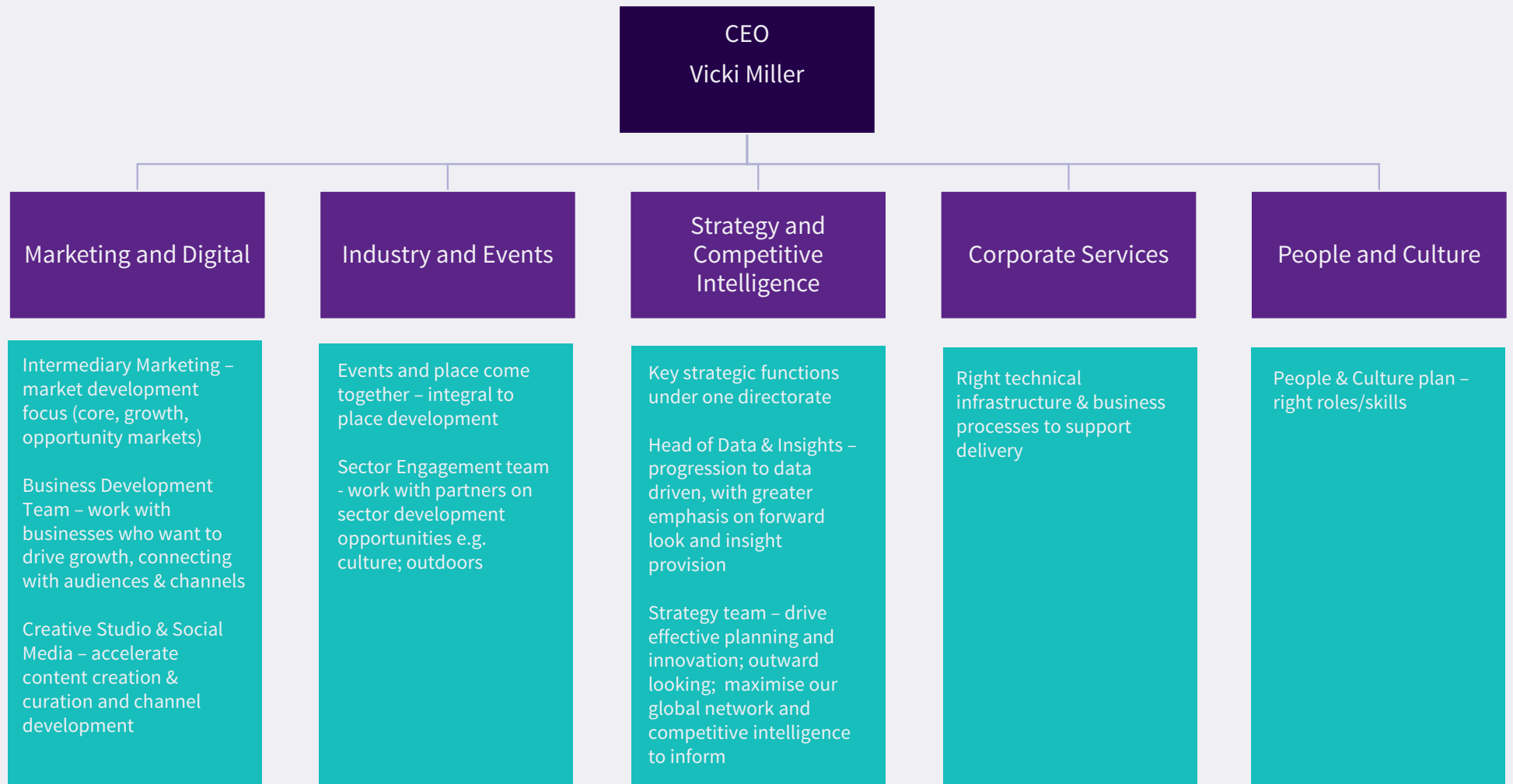
Spend

36% of VS.com visitors reported VS.com was providing a 'major' or 'strong influence' to visit

Spread

13 areas across Scotland promoted as part of Scotland's UNESCO Trail. Numerous international awards and imitators

VisitScotland – some organisation changes to ensure we are set up to deliver



WHO VISITS SCOTLAND?

Global tourism is back

International arrivals reached 98% of 2019 levels in Q1-Q3 2024 and up 11% on 2023

and

Scotland is ahead of the curve

International arrivals to Scotland in Jan-Jun 2024 were 14% up on 2023 levels and 46% up on 2019

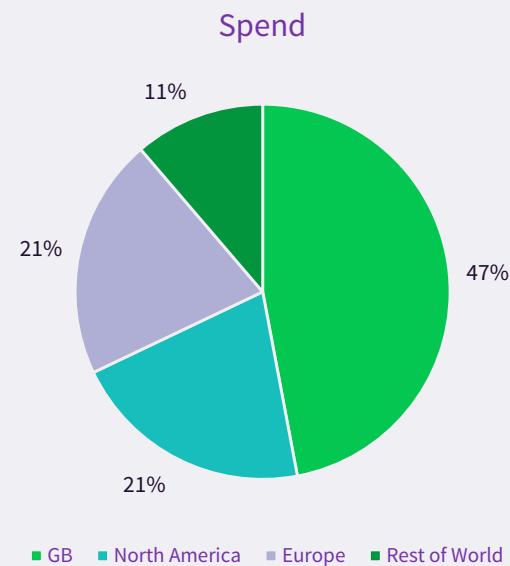
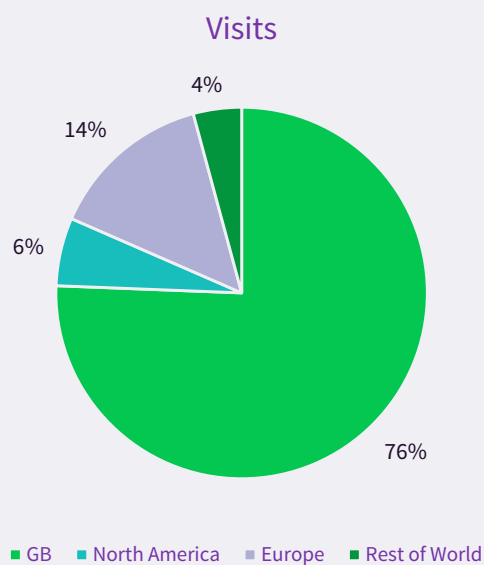
but

From staycation to stay-cautious

Trips and spend by GB residents as part of overnight stays in Scotland during the first half of 2024 were down 20% on 2023



Who visited Scotland in 2023?

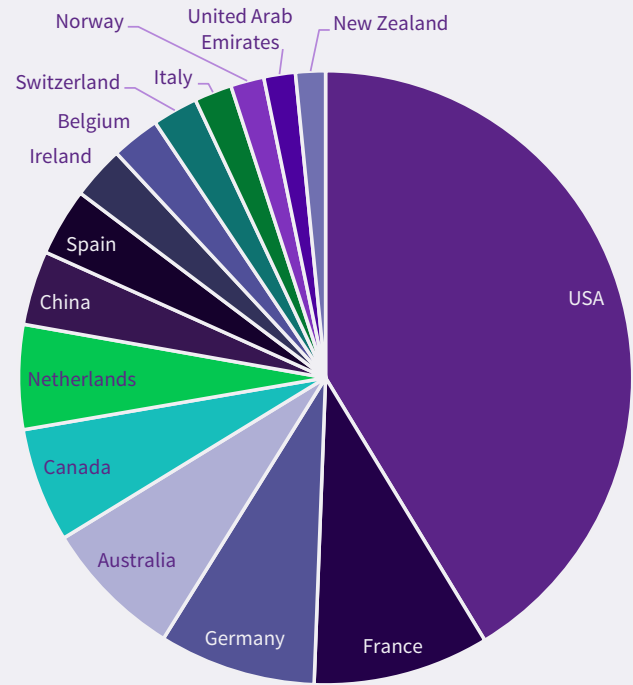


International accounts for 24% visits and 53% spend

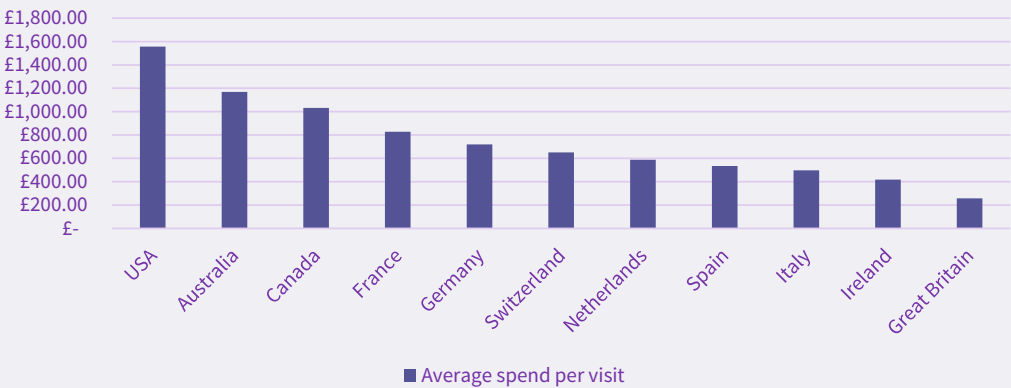
GB accounts for 76% visits and 47% spend

Who visited Scotland in 2023?

Spend by Top 15 Countries (83% of Int'l spend)



Average spend per visit



Source: GBTS 2023, International Passenger Survey 2023 – All visits

*Top 10 international markets and GB by number of visits to Scotland

Scottish residents



Visits and spend down on 2023 driven by reduced trip taking by Scottish younger independents and families (~1m trips).

Recovery from older independents is an opportunity.

English residents



Fewer English visitors across all life stages to Scotland in 2024, however an increase in spend per trip of 51% for holidaymakers.

North Americans



North American visitors continue to drive growth of international tourism in Scotland with visits and spend up on 2019.

North American visitors are typically 45+ travelling with friends or family.

Europeans



European visitors to Scotland were at a similar level in 2023 and 2024 (H1). Scotland welcomed over 1M European visitors in the first half of 2024, but spending from these visitors was lower than 2023. Visitors trend to be younger and travelling with children.

OPPORTUNITIES FOR 2025 AND BEYOND

Meeting visitor demand

Globally, consumers are increasingly spending on **experiences** instead of material goods.

The wellness economy alone reached a peak **\$6.3 trillion** value in 2023, projected to grow to nearly \$9 trillion by 2028.

In travel, visitors are seeking more **meaningful travel experiences**, with a deeper understanding of their impact on their own and the planet's wellbeing.



A competitive advantage

Scotland's key transformation economy opportunities

- Wellbeing tourism – outdoor, wellness, connection
- Heritage and history – immersive storytelling, cultural connections, workshops and authentic crafts
- Food and drink – local provenance, farm to fork
- Outdoor adventures – wildlife and nature, coasts and waters, hills and peaks, water activities, cycling and walking
- Arts and festivals – traditional (i.e. Highland Games) to the contemporary (i.e. Edinburgh Fringe), ceilidhs and trad music, food and drink
- Volunteering and conservation – environmental restoration and conservation, rewilding, learning experiences



Building blocks of our strategy

Achieving our objectives



Strong Destination Brand – building Scotland's international profile as a place to visit and live, work, study and do business



Market Prioritisation & Development – an investment model to deliver the greatest return on investment



Market & Product Development – a bi-focal approach to create the right products to maximise internationalisation opportunities



Storytelling – a creator & curator of social 1st content to drive destination advocacy



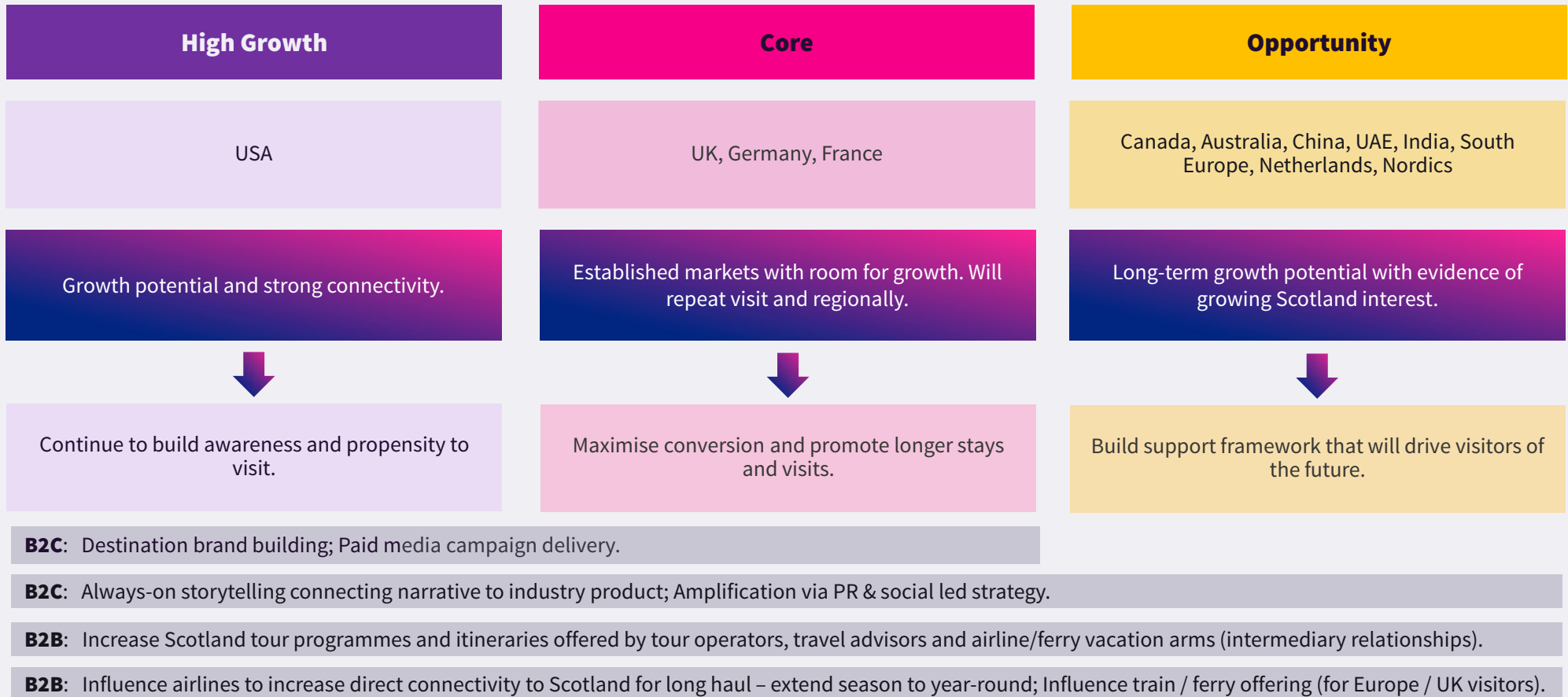
Integrated Marketing - across the customer journey with paid, earned & owned channels working together to maximise economic impact



Partnerships - leverage collective resources and expertise to facilitate conversion and ROMI

Market Development

Investing to maximise impact



DRIVING GROWTH IN THE VISITOR ECONOMY – KEY AREAS OF WORK

Strategic Context

Economic and political
uncertainty

New policy environment
NSET
Fair Work
National Policy Framework

Financial pressure
(Scottish Government
Resource Spending Review)

Climate emergency

Competitive travel landscape
and changing traveller
behaviour

Sustainable growth of the visitor economy is key to Scotland's future
economic prosperity

Public service reform.
A culture of delivery = remove
duplication, increase
alignment, agility and pace

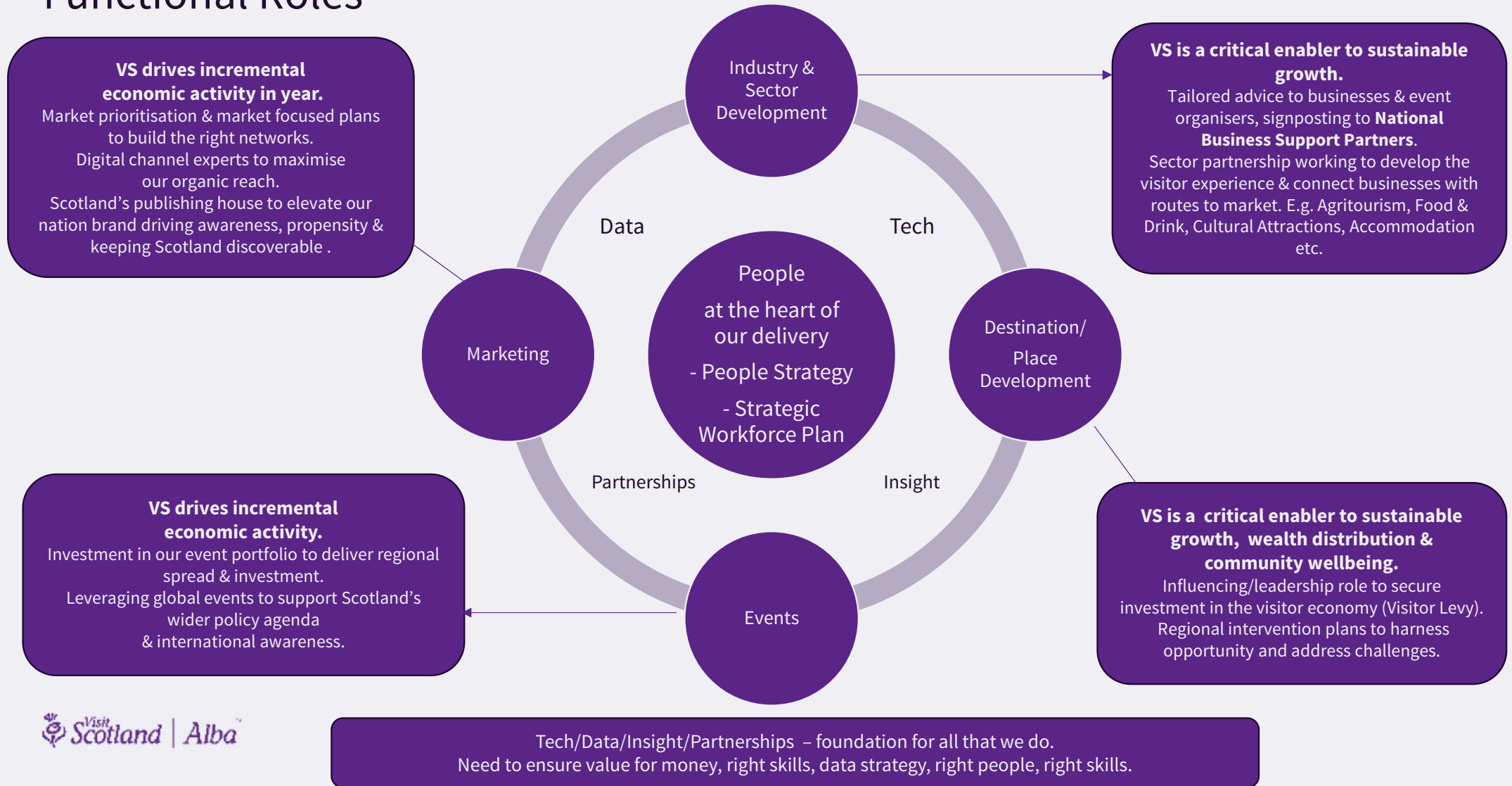
An **opportunity** to **focus** on
the medium to longer-term
challenges and opportunities
we face
= focus and prioritisation

VS responsibility to provide
industry leadership and help
businesses navigate change

An opportunity to review how
we are set up and what
capability we need for the
future

Ensuring we have the right
people in the right roles to
deliver on our strategic
objectives

Functional Roles



Connecting Regional Economic Partnerships and The Visitor Economy



Translating **National** Policy
into
Regional Policy
and
Regional Activity in **Destinations**

VisitScotland Business Support Hub

Users: Tourism and events businesses

Vision: To be the go-to place for sector advice and support for tourism and events businesses.

Objectives:

- Make it easier for businesses to find useful and relevant information that can inform their planning
- Keep it updated with timely actionable insight
- Build stronger connections with key industry partners and signpost to their resources (avoid duplication)
- Enhance business competitiveness and growth
- Supported by workshops & webinar programme

Site launched 1 April 2025

Content themes associated with:

Delivering quality experiences

Developing new products

Travel distribution and working with travel trade

Net zero and sustainability

Inclusive tourism

Managing your digital channels

Legislation

Responding to insights and trends

Marketing opportunities

Training and networking opportunities

Events development

Meeting visitor expectations

Visitor Levy (Scotland) Act 2024

Overview

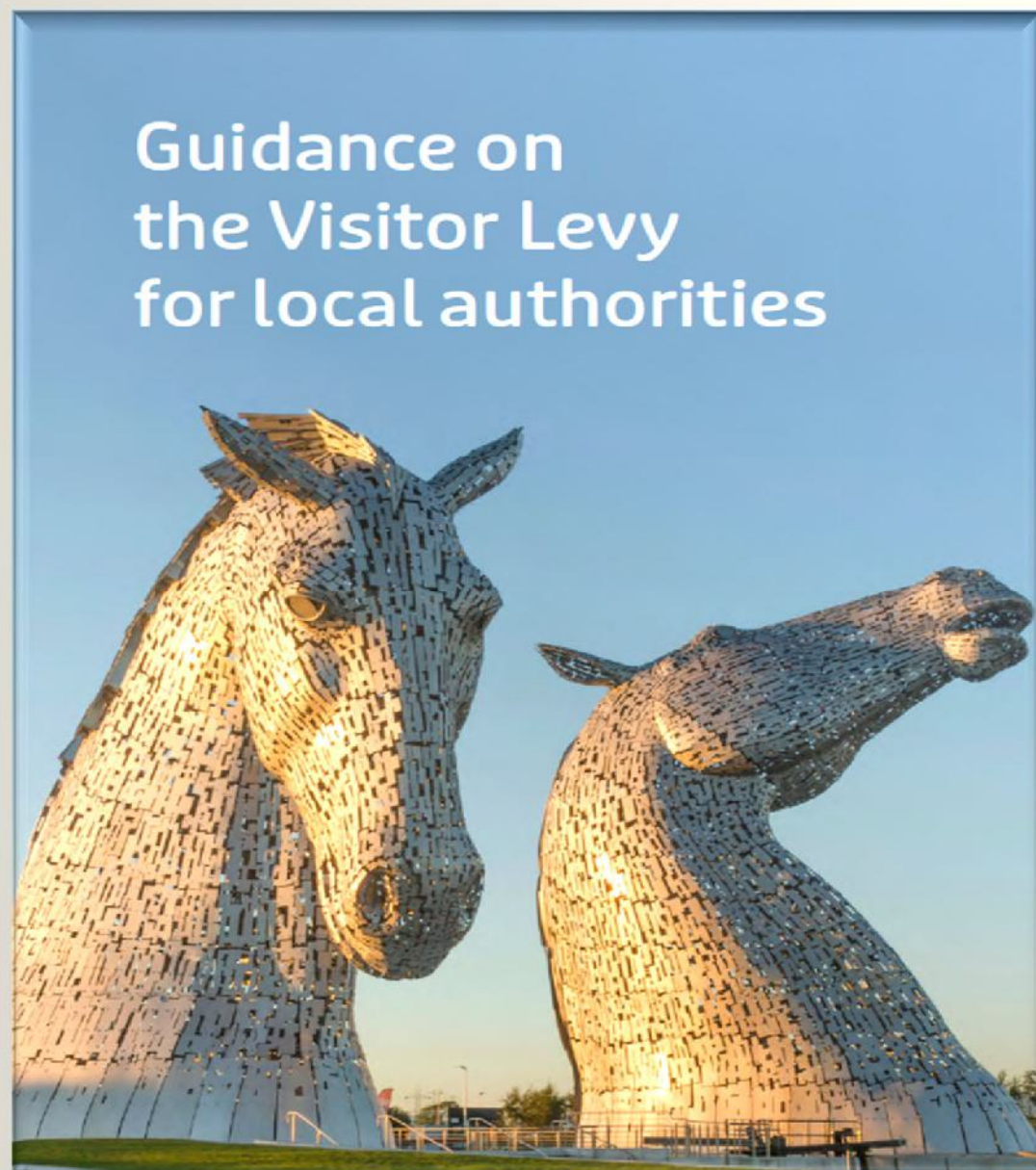
- The Act allows a visitor levy to be charged on overnight stays in certain accommodation types.
- All 32 local authorities have the power to introduce a visitor levy.
- Must be a % of the cost of the accommodation portion of the overnight stay.
- Local authorities must consult with local communities, businesses and tourist organisations before introducing.
- Visitor Levy Forums ('advisory bodies') to be set up within 6 months of a scheme being announced.
- Requirement for local authorities to state whether they will exempt businesses below VAT threshold.
- All money raised would be reinvested locally on facilities and services substantially for or used by visitors (leisure and business), enhancing the visitor experience.



Visitor Levy Guidance

Visitor Levy Expert Group

- Scottish Government invited representatives from the tourism industry and local authorities to join an Expert Group, chaired by VisitScotland.
- Following Stage 2, Ministers asked VisitScotland to prepare statutory Visitor Levy Guidance. This guidance will be updated as appropriate on an ongoing basis.
- Purpose: to develop guidance and best practice for local authorities on the Visitor Levy Bill, to ensure the new discretionary power works for businesses, communities, visitors, and for Local Authorities.
- Members:
 - VisitScotland
 - COSLA (local authorities, SOLACE, CIPFA)
 - Industry (STA, UK Hospitality, ASSC)
 - Scottish Government



Use of Funds raised by Visitor Levy



Visitor Levy

Additional Industry Support

[Visitor Levy Guidance | VisitScotland.org](#)

- Case Studies
- FAQs
- Glossary of terms
- Proposed visitor levy schemes across Scotland

What will my local authority levy scheme look like?

Open all

How do I know if there are plans for a visitor levy in the local authority area where my business is located?



How is the visitor levy revenue used by the local authority? / Can I inform my customers about how their contributions are being spent?



What if I have properties in multiple local authorities?



Argyll & Bute Council

Main contact details for the council are: abvl@argyll-bute.gov.uk.

The council's formal consultation period is now live until 10 April 2025.

[Participate in the consultation on argyll-bute.gov.uk.](#)



Glasgow City Council

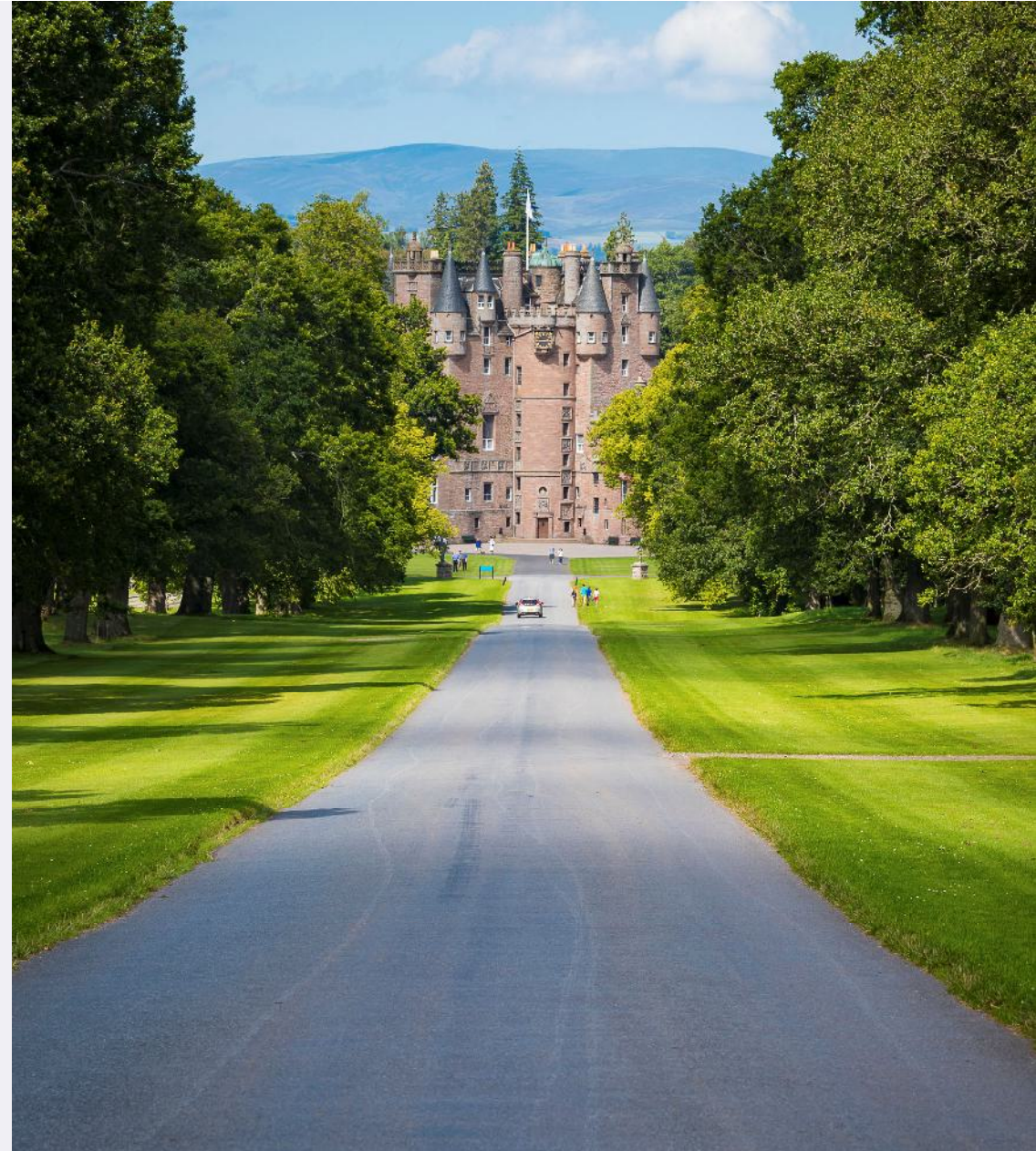
Main contact details for the council are: consultationqueries@glasgow.gov.uk.

The council's formal consultation period is now live until 2 May 2025.

[Participate in the consultation on smartsurvey.co.uk.](#)

Industry Challenges

- Business impact
- Governance
- Transition Period/Forward Bookings
- Price competitiveness
- Calculating the levy
- VAT
- Sector Engagement

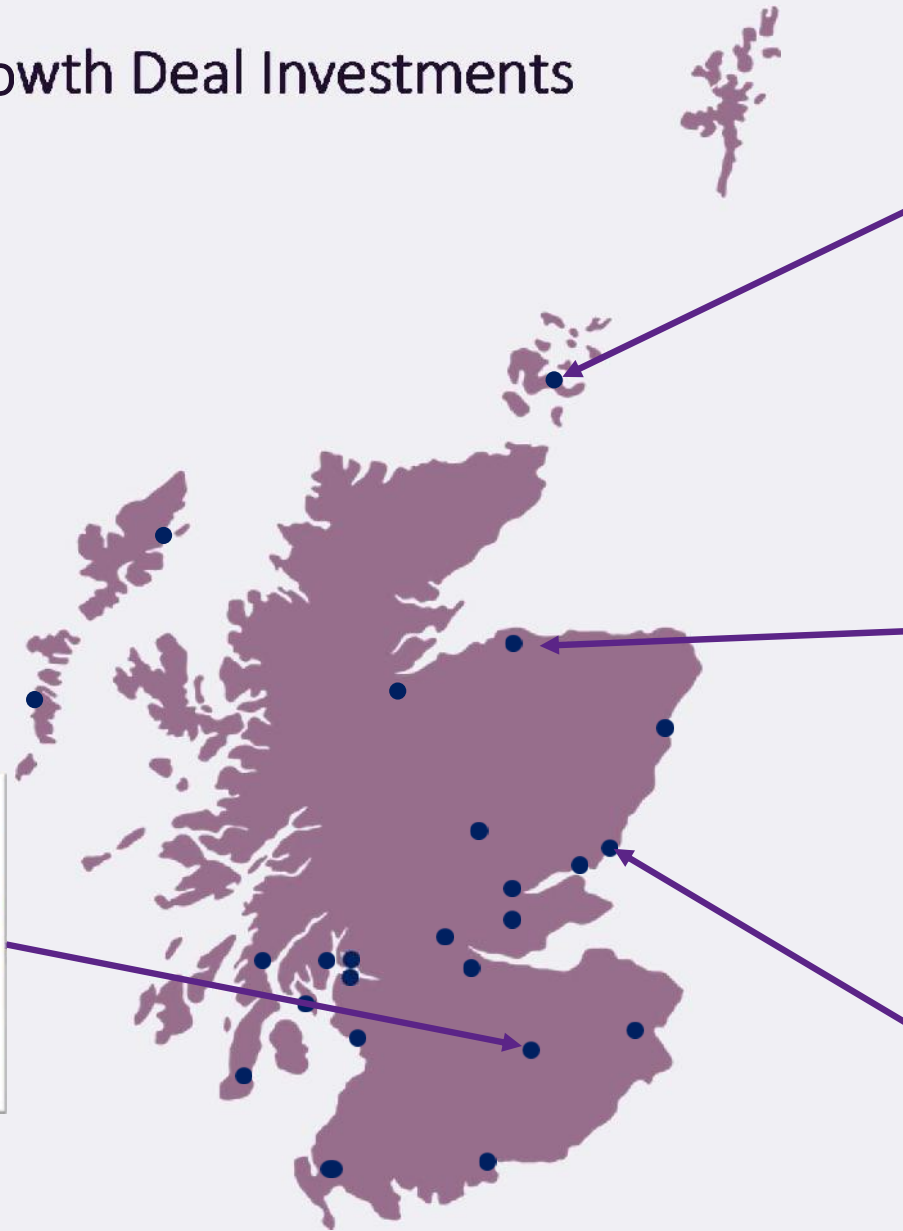


City Region and Growth Deal Investments

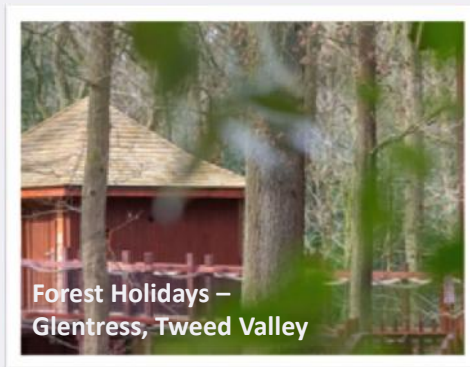
30+ Projects
Over £600m
investment



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Transformational Investments



South of Scotland partnership working



- VS & HES members of -
 - Convention of the South of Scotland
 - South of Scotland Regional Economic Partnership
- Regional Economic Strategy – tourism priority
- South of Scotland Responsible Tourism Strategy launched 2024
 - VS one of five lead partner agencies
 - Ambition to increase Visitor Economy by £1bn and support further 6000 jobs by 2034
 - HES sat on Advisory Group through strategy consultation and creation
 - HES contributing to Action Plan delivery leading to stronger strategic connections across visitor economy in South of Scotland



Key pillars of focus -

- Inspire visitors
- Develop visitor experience
- Support business
- Act responsibly



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THANK YOU