

# Michael Golding

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THILG

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# Who Does ASVA represent?



# Our Vision & Mission



# How Does ASVA Inspire, Represent, Connect & Inform?



# Conference and Industry Insights





ASSOCIATION OF  
SCOTTISH  
VISITOR  
ATTRACTIONS

**ADMITS ONE**

Valid Until 31.3.2024

**asva.co.uk**

# ASVA Card: A key industry benchmarking tool for the Scottish Visitor Attraction sector.

This card admits the holder free of charge to listed ASVA members' properties.\*

EMAIL: [info@asva.co.uk](mailto:info@asva.co.uk)

**ORGANISATION**

**CARD NUMBER**

# Training and Development



# Voice & Representation





# Connecting our Sector



# Research, Benchmarking and Data

## Survey Methodology

The ASVA Attractions survey was hosted online, and a link was emailed to all participating Attraction organisations within ASVA. Feedback was received from 112 organisations, comprising 389 attractions.

38

Full Time Equivalent (FTE) Staff per organisation

## Increased Footfall

Was the main criteria of success for organisations

 **£12.78**  
 **£5.56**

The price for tickets on average

74%

% of visitors from within the UK  
(Scotland 48%, Rest of UK 26%)

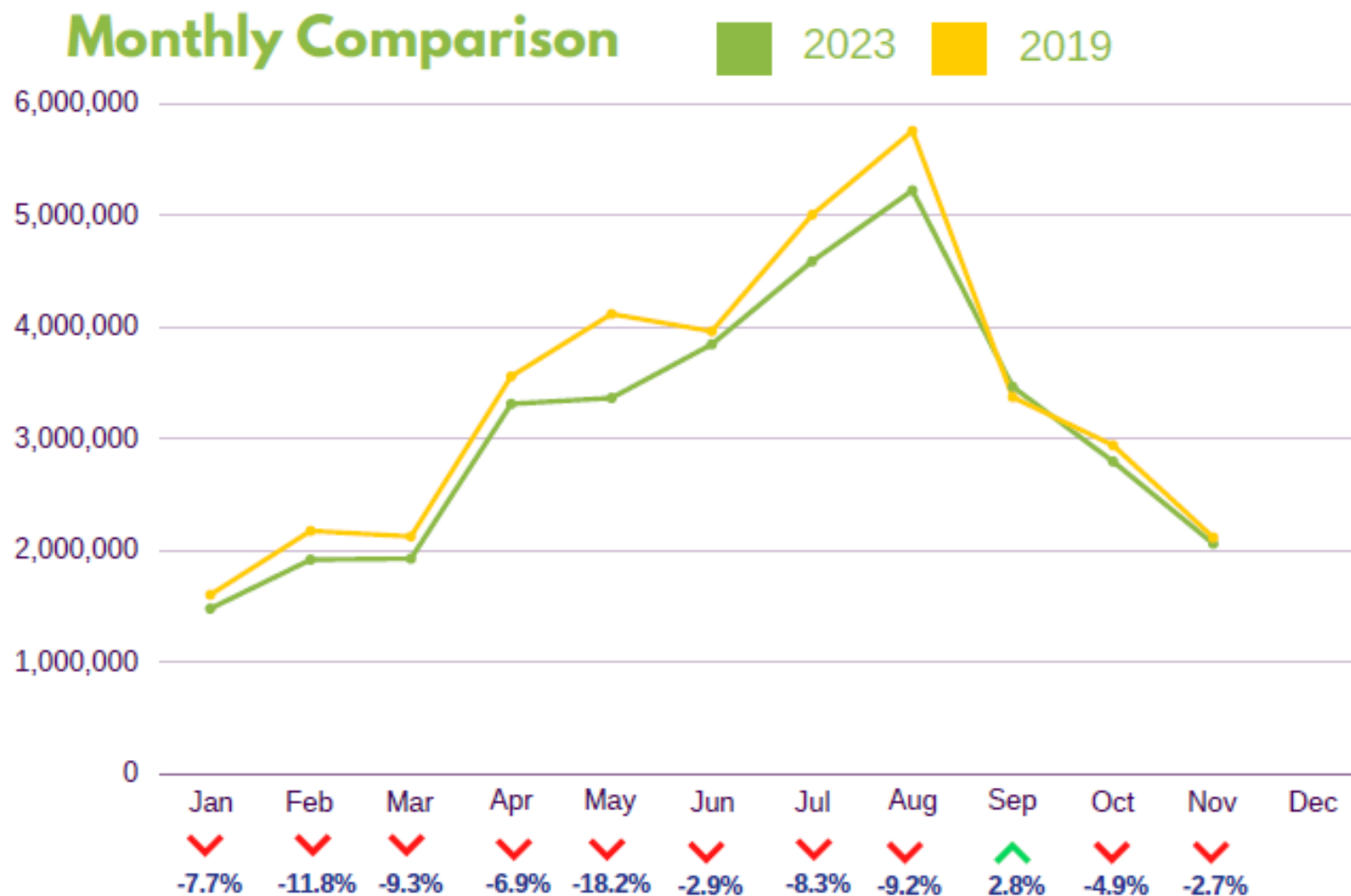
Loss of **£79k**

Attraction's average Net Gain / Loss during 2022

# How Does ASVA Inspire, Represent, Connect & Inform?

- Industry updates
- Recruitment
- Reduced rates

# What is Happening in the Sector?



# What is Happening in the Sector?

2023 Year to Date (vs. 2019)

**-4%**

Accessible Rural

**-19%**

Accessible Small Towns

**-8%**

Large Urban Areas

**-3%**

Other Urban Areas

**-23%**

Remote Rural

**-30%**

Remote Small Towns

# What is Happening in the Sector?

- 35M visits to ASVA members in 2023
- 91% vs 2019
- Small towns and rural recovery slower
- Strong international market, suppressed domestic
- Costs, recruitment, profitability, TVL
- UK leaders on recovery and experience
- Commitment to outstanding experiences

# The Year Ahead

- QA, TVL
- Visitor Experience, Technology, Sustainability
- Resource, Brand, Business Plan
- Clarity, Efficient, Effective
- Commitment to support attractions, supply chain, academics, and the wider tourism industry



## INTRODUCING THE SCOTTISH TOURISM ALLIANCE

The Scottish Tourism Alliance (STA) is the largest member organisation and leading representative body for Scotland's tourism and hospitality industry.

The STA's core purpose is to represent the industry, informing key stakeholders of the need for support to overcome challenges as well as capitalize on opportunities, both now and in the future.

Working constructively with politicians, senior policy makers and civil servants, the STA seeks to influence investment and positive policy changes to create the best possible conditions for the sector to survive, thrive and grow sustainably.





# KEY POLICY ASKS OF SCOTTISH AND UK GOVERNMENTS



## **Ensure the right policy and regulatory landscape is in place that reduces red tape:**

minimising the burden of regulation and accompanying costs for industry and visitors, and fostering a long-term relationship between government and business through better joined up policy making from the outset and ongoing transparency.



## **Support a sustainable and professional tourism and hospitality workforce:**

attracting, developing and retaining a skilled, committed, diverse and valued workforce, with the principles of Fair Work enshrined in the sector and affordable housing available for workers and their families.



## **Position Scotland as a world-leading visitor destination:**

striving to be competitive on price, delivering a high-quality visitor experience for all, and recognising the essential role of marketing Scotland to UK and international audiences as a must-visit tourism destination.



## **Recognise tourism as a force for good:**

develop a better relationship between visitors and local communities, with a focus on the wider benefits tourism delivers and the importance of long-term investment in destination organisations in enhancing and delivering world-class managed visitor destinations.



## **Deliver better transport and digital connectivity:**

ensuring an enhanced and seamless visitor experience and protecting the sustainability of our local communities and businesses, while realising innovation and future-proofing opportunities for the sector.



**TOURISM & HOSPITALITY  
INDUSTRY LEADERSHIP GROUP (ILG)  
UPDATE MARCH 2024**

# Scotland Outlook 2030

## Responsible tourism for a sustainable future



### **Vision**

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Scotland - we will be the world leader in 21st century tourism.

### **Mission**

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Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.

Scotland Outlook 2030  
Responsible tourism for a sustainable future



**Our Diverse Businesses**

**Our Passionate People**

## **Strategic Priorities**

**Our Thriving Places**

**Our Memorable Experiences**

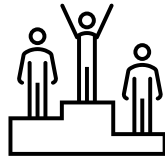
# How will Scotland Outlook 2030 be achieved?



# Purpose of the ILG



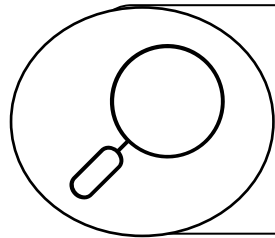
To provide strategic direction to drive Scotland's ambition to be the world leader in 21<sup>st</sup> century tourism.



- Champion Scotland Outlook 2030
- Provide strategic leadership



- Advocate core principles of Scotland Outlook 2030
- Engage collaboratively



## Who is the ILG?



Scottish Government  
Riaghaltas na h-Alba



COSLA



Scottish Enterprise



Visit  
Scotland | Alba™



SCOTTISH  
TOURISM  
ALLIANCE

Your voice in tourism matters



SOUTH of  
SCOTLAND  
ENTERPRISE



H I E

Highlands and Islands Enterprise  
Iomairt na Gàidhealtachd 's nan Eilean



unite  
the UNION

# Who is the ILG?

A network of individuals from the public, private and the third sector.

18 industry members

Nine organisations





# What did we find out in our first year?

1

Scotland Outlook 2030 remains **relevant, aspirational and ambitious** and is aligned to NSET.

2

A mix of short, medium and long term **actions** were identified to support the delivery of Scotland Outlook 2030.

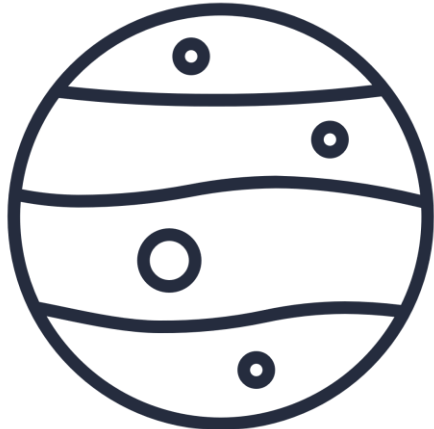
3

**Many opportunities and challenges** will arise during the lifetime of the strategy impacting the four strategic priorities and their outcomes.

# Five Missions – the ILG focus

Proud and valued people working for Scotland

Community-led tourism



Embracing rapid technological change

Sustainable transport



Net zero acceleration



# Where can the ILG add the most value?

ILG area of influence



Drives ILG agenda

## Scotland as a global leader in community-led tourism

Deep dive to encourage and develop understanding

ILG as advocates for community-led tourism

How we measure success

## Net Zero acceleration

Go beyond existing  
activities

Embed in other  
missions

# Mission content

With rapidly changing technology, tourism  
must lead, not follow

Opportunities for  
tourism trailblazers to  
experiment & explore

Ethical and innovative  
adoption of AI

An outstanding resilient and flexible workforce,  
proud of what they do

Engage career  
decision makers

Promote  
diversity across  
the sector

Identify  
relevance to  
existing groups

Sustainable transport: a joint endeavour to build the resilience of Scotland's tourism & hospitality sector

Actions required:  
consumer behaviour &  
infrastructure

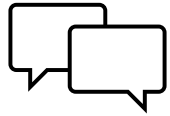
Customers addressed:  
visitors & supply side



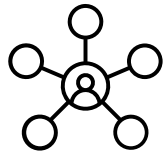
# How will we achieve the Missions?



Identify areas of opportunity



Engage and influence within and beyond our sector



Work in collaboration



Sharing updates with industry



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# Thank You

