



GROWING THE VALUE OF THE VISITOR ECONOMY

VisitScotland Update

Our Purpose

To drive the visitor economy growing its value to Scotland.

Our Vision

Contribute to 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 demand

Supporting tourism & events businesses

Working collaboratively with community, destination & sector organisations

Enhancing our organisation insight, capability, planning & compliance

Supporting & enabling our people

Context

What does success look like?

Success will be in delivering against these 4S outcomes for:

- Our visitors
- Our industry
- Our communities

SPREAD

Spread of customers through the year and across Scotland

SPEND

Increased yield from each visit

SUSTAINABILITY

Improved environmental footprint and conservation of natural and cultural heritage

SATISFACTION

Improved end-to-end stakeholder experience

Visitor data 2022/23

Who came to Scotland?

In 2022 GB accounted for 81% visits and 52% spend (down from 55% pre Covid)

- In 2023 at the end of Qtr 3 **domestic visits down 3%** on 2022 YTD and **expenditure flat**

In 2022 International spend was up 24% on 2019

- In 2023 at the end of Qtr 3, **international visits YTD up 33%** on 2022 and **spend up 19%**

Day visit market spend of £3.9BN in 2022

- In 2023 at the end of Qtr 3, **day visits are up 6%** YTD

13.5M

GB overnight trips

3.2M

International visits

£3.4BN

GB overnight spend

£3.2BN

International spend

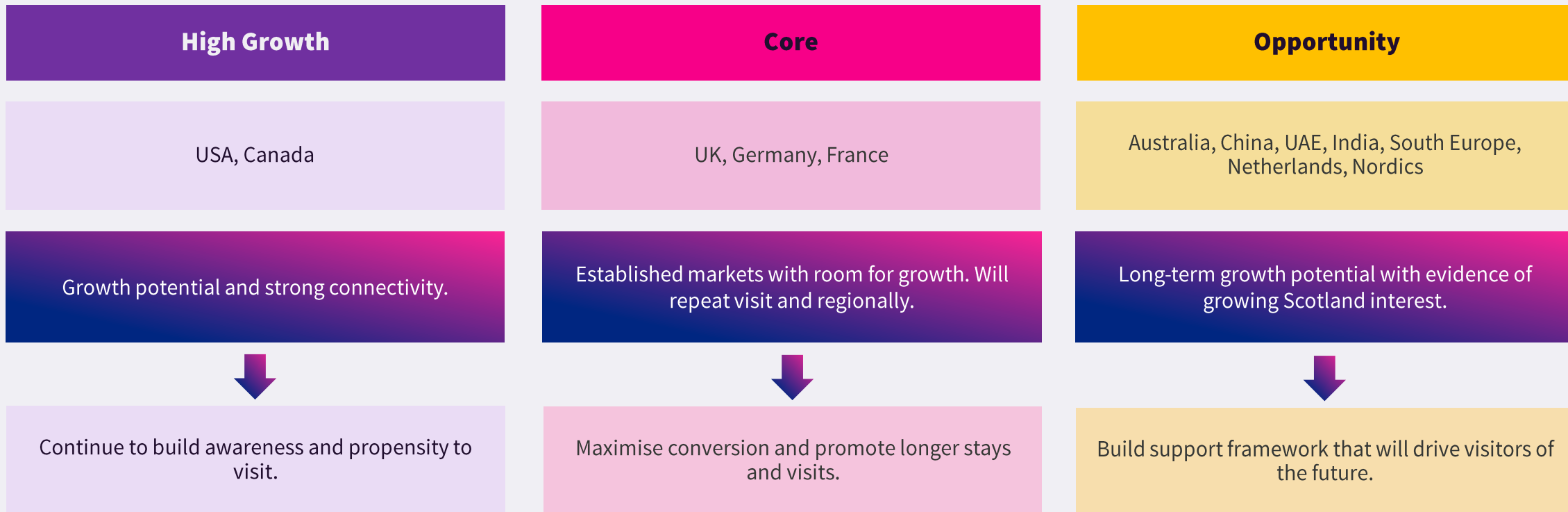
Who came to Scotland in 2022? International Spend and Visit



* Sample of key markets. Doesn't include China due to travel restrictions.

Market Prioritisation

Investing to maximise impact



Direct to consumer: Scotland is Calling destination brand building; paid media campaign delivery.

Direct to consumer: Always-on storytelling connecting narrative to industry product. Amplification via PR & social led strategy.

Working with intermediaries: Increase Scotland tour programmes and itineraries offered by tour operators, travel advisors and airline/ferry vacation arms.

Connectivity: Influence airlines to increase direct connectivity/frequency to Scotland – extend season to year-round. Influence train / ferry offering for Europe / UK visitors.

Building blocks of our approach



Strong Destination Brand – showcasing Scotland as a destination that delivers “powerfully enriching personal experiences”



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



Market & Product Development – creating memorable experience that meet the needs of our visitors



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 make Scotland discoverable



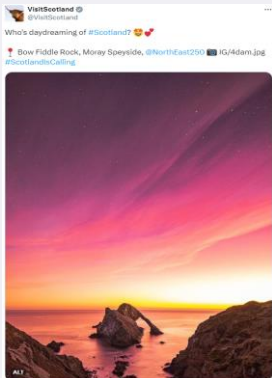
Partnerships to leverage the might of others & facilitate conversion – Destination, Sector, Commercial, Media, Strategic Partners

Integrated Marketing Delivery

Reaching the visitor at every stage of their journey



Storytelling Calendar:	To inspire people to experience Scotland and make sustainable choices during their stay.			
Content proposition:	<i>THE inside source of what's happening in Scotland, providing the best ideas and practical advice for your trip</i>			
Key Sectors:	Outdoor Adventures	Food & Drink & Agritourism	Culture & Curiosity	
	<ul style="list-style-type: none"> Scotland's landscapes & nature Outdoor Active inc. Cycling & Walking Wellness & wellbeing 	<ul style="list-style-type: none"> Local sustainable produce Unique places to eat & drink Rural escapes, farm stays & on-farm adventures 	<ul style="list-style-type: none"> Events & festivals Ancestry Galleries & museums Film & TV Local communities / city neighbourhoods 	
	← Connecting to Bookable Experiences: <i>Visitor Attractions, Tours & Experiences, Events, Places to Stay, Places to Eat & Drink</i> →			
Seasonal Calendar:	<i>Spring</i> Outdoor Adventures Foodie Delights Island Hopping Cultural Festivals Great Days Out Farm Stay Retreats	<i>Summer</i> Festival Fever Coastal Retreats Off-the-beaten path Water Adventures Sunset scenes Street Foods	<i>Autumn</i> Landscape & Nature Dark Skies Cultural Festivals Seasonal Foodie Experiences Cosy Stays Tranquil Retreats	<i>Winter</i> Coorie Outdoor Adventures Stargazing & Northern Lights Festive Spirit Winter Festivals Shop Local
Content Type & Sources:	<ul style="list-style-type: none"> Article Listicle Itinerary Guides Video 		Enriching content with different perspectives: <ul style="list-style-type: none"> VS network Industry network Influencer & PR activity extension Expert guest contributors 	



Organic Social Media

8.9M
Total Social Reach for Moray Speyside

555K
Total Social Engagement



Genießt innovative Gaumenfreuden

In Schottlands Küchen trifft Alt auf Neu. Während Klassiker wie Haggis, Fish 'n' Chips und schottischer Porridge ein Muss sind, bringen frische Öko-Lebensmittel aus der Region und innovative Gewürz-Variationen neue Kreationen an die Tagesordnung. Von gehobener Küche in angesehenen Sternrestaurants, über Streetfood am Meer bis hin zu preiswerten Lokalen in der Nachbarschaft, findet in Schottland jeder Gast die richtige Adresse.



Whisky

Doch was wäre ein Schottlandurlaub ohne das Nationalgetränk haben: Whisky. Das „Wasser des Lebens“ wird seit mehreren Jai Schottland mit viel Hingabe produziert. Dabei unterscheidet es Region. Ob aus den Highlands, der Speyside oder von den scho gibt es rund 130 aktive Destillieren in Schottland, die alle ihren Whiskyherstellung verfolgen. Macht eine Destillierführung mit Whiskyverkostung oder stoßt mit den Einheimischen mit einem der typischen Pubs an. Ein Highlight für Whisky-Fans ist außerd einzigartige Malt Whisky Trail in Speyside. Er führt an sieben einer historischen Brennerei und der faszinierenden Böttchere antlann.

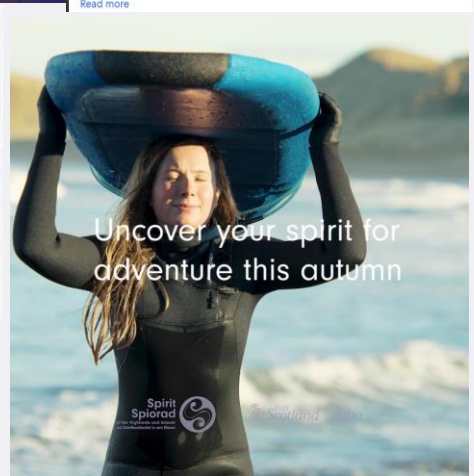
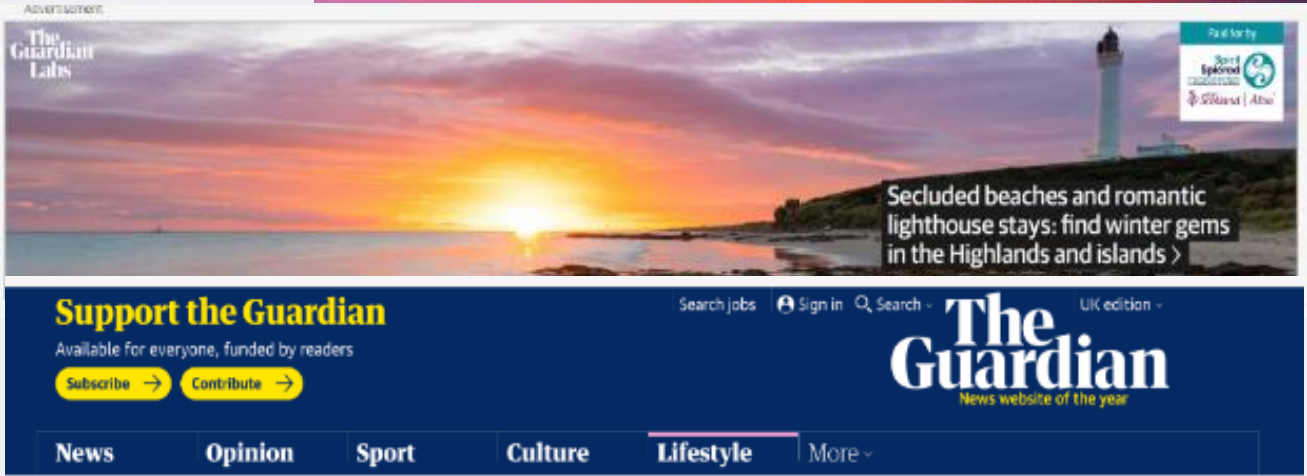


Innovative tastes

Discover the stories and people who nurture our Scottish produce through field to fork agritourism experiences. Enjoy local delights like Shetland salmon, Stornoway Black Pudding, Arbroath Smokies, and Aberdeen Angus beef, not forgetting our finest Scottish whisky, gin, and craft ales. Speyside is a whisky lover's dream, as home to over half of Scotland's distilleries, or visit the Isle of Islay for an island farm and distillery tour. Look out for businesses with Taste Our Best accreditation, highlighting they use quality ingredients of Scottish provenance. And don't forget to try haggis, Scotland's iconic dish! There are plenty of tasty vegan alternatives to cater for meat-free diners too.

Spirit of the Highlands & Islands

72M
Paid media impressions



Figures relate to coverage in last 12 months

12 TOP THINGS TO DO IN MORAY SPEYSIDE

Moray Speyside is a beautiful countryside region in the north of Scotland. You'll find it to the east of Inverness, running from the north coastline of the Moray Firth to the rugged Cairngorms in the south. Things to do in Moray include historic places, stunning viewpoints, outdoor activities and delicious food & drink.

23M
Annual web visits to vs.com



Highlands | Things to Do In and around Moray Speyside Itinerary

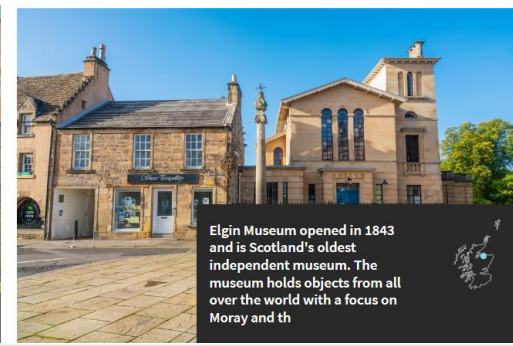
THINGS TO DO IN AND AROUND MORAY SPEYSIDE ITINERARY

1 SAMPLE FOOD & DRINK MORAY SPEYSIDE



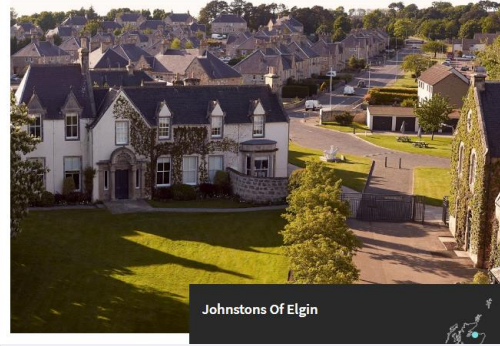
Glenlivet Distillery

2 EXPLORE THE MAIN TOWN ELGIN



Elgin Museum opened in 1843 and is Scotland's oldest independent museum. The museum holds objects from all over the world with a focus on Moray and th

3 BROWSE BEAUTIFUL TEXTILES JOHNSTONS OF ELGIN



Johnstons Of Elgin

7 EXPLORE HISTORIC CASTLES BALLINDALLOCH CASTLE



Spring at Ballindalloch Castle

9 SEE UNIQUE CASTLE EXAMPLES DUFFUS CASTLE, ELGIN



Duffus Castle

12 GET OUT ON THE GOLF COURSES MORAY SPEYSIDE



Hopeman Golf Club



Whisky & Distilleries | Speyside's Malt Whisky Trail

SPEYSIDE'S MALT WHISKY TRAIL

Scotland's Malt Whisky Trail is the only trail of its kind in the world. Set in the heart of stunning Speyside, this trail takes in seven world-famous working distilleries, one historic distillery and the fascinating Speyside Cooperage.

Speyside is often called 'Malt Whisky Country' as its home to more than half of Scotland's malt whisky distilleries and is one of the country's five whisky regions.

Start / Finish Glenlivet / Forres

Figures relate to coverage in last 12 months

Email Marketing

Moray Speyside continues to feature within our email programme to over one million global contacts, across 15 markets in 5 languages

Each email is designed with seasonality and geographic spread in mind, while promoting responsible tourism. We signpost to businesses and regional locations highlighting experiences and travel inspiration.


1M
Global email contacts



TRAVEL TO THE HEART OF IT ALL

Discover globally iconic distilleries, meet the crafters and connect with others united by the love of whisky.

[SPEYSIDE ITINERARY](#)




Elgin Cathedral

READY MADE ADVENTURE

Fall in love with our food and drink, discover the great outdoors or step back in time with our vast history. Take your time. There is no rush.

[5 DAY ITINERARY](#)

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Covesea Lighthouse, Lossiemouth

GLOWING SKIES

Seeing is believing! Check out beautiful sunrise spots from around Scotland, sure to set your wanderlust ablaze. Experience a kaleidoscope of colour on a refreshing coastal walk, from crashing blue and green seas to the ginger, blonde and black Highland cows on land.

[VIEW MORE](#)

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Strathisla Distillery, Keith

WHISKY - EEN TIJDLOZE KLASSIEKER

Hef samen met ons het glas op onze nationale drank - vandaag, op World Whisky Day. Verdiep je in het traditionele meesterambacht, ontdek onze iconische en nieuwe distilleerderijen, plan authentieke ervaringen – al deze geweldige momenten kun je ervaren tijdens je volgende reis.

[LEES MEER](#)



NEW: TASTE OF MORAY SPEYSIDE

Explore this flavourful food and drink trail, meeting dedicated makers, savouring exquisite drinks, and enjoying diverse regional culinary delights.

[SAMPLE MORE](#)

HAND PICKED EVENTS FOR YOU

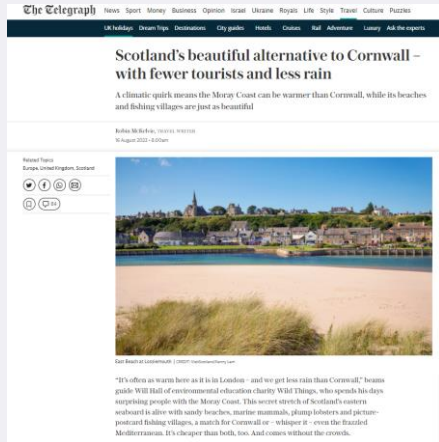


SPIRIT OF THE SPEY

Be captivated by the best of traditional and modern Celtic music with concerts, ceilidhs, workshops and fairs at Moray's folk festival, 21-23 July.

[SPEYFEST](#)

Press & PR



Above: Moray Coast as a less-busy location to visit in Scotland, in the **Telegraph** online (reach: 675,000).



Above: Glenfiddich Distillery in Moray Speyside in **Travel + Leisure** (US); reach: 2.3 million.



Les Echos Weekend, France, right; 'Whisky tourism goes from strength to strength', Speyside whisky region featured prominently (reach: 135k).

ADAC Urlaub magazine feature (Germany), left; The article features a full page on exploring the Malt Whisky Trail (reach: 160k).



Figures relate to coverage in last 12 months

TRAVEL LOOKS DIFFERENT IN 2024

Visitor trends



Consumer sentiment – Jan to Jun 2024 intenders

There is a strong aspiration to take a UK domestic trip amongst the UK public - but intention is not always converted to an actual trip.

More than half (53%) of the UK population are anticipating taking a domestic holiday or short break between January and June

12% of trip intenders plan to travel to Scotland – slight increase on 2023 (and 3rd highest behind London and SW).



Families (between pre-nesters and older independents) make up the largest proportion of Scotland intenders (1 in 3) – although this includes couples.

Retirees are smaller in number but are more likely to have booked/committed to the trip.



The Highlands most popular planned destination for Scotland residents (50%). 21% (2nd most popular) for non-residents.

Walking, visiting heritage sites and cultural attractions and trying local food and drink are the leading activities planned.



Top global trends that will impact the Scottish tourism and events industry over 2024-2027



People with passion

Evolution towards more connected travel experiences that gives rise to a tourism model that focuses on deep, authentic community engagement and tailored journeys placing people at the heart



Places and immersive experiences

Global shift towards authentic travel, prompting the industry to offer deeper cultural connections and personalised exploration, particularly for Scotland's rich heritage and hidden gems



Power to change

A new generation of travellers are increasingly eager to access responsible and meaningful experiences and events. Businesses will need to continue to adapt and embrace to fulfil this consumer desire

Using these trends to evolve your marketing

People with passion

- Use personal stories and local characters to create connection
- Shout out local heroes (historic or current)
- Use historic recipes to spotlight local produce
- Rebrand self-guided routes “in the footsteps of a local figure ”
- Lean into themes of local characters or mythology
- Personalisation – exclusive offers and “wow” moments

Places and immersive experiences

- Encourage and provide inspiration for longer stays
- Create “brand identify clusters”
- Theme content around local history, industry, product or wildlife
- Signpost visitors through multiple linked attractions
- Showcase small festivals, markets and cultural events around local themes
- Feature self-guided tours using QR codes with signposting across various businesses - shops, museums, cafés

Power to change

- Align business values with the consumers you want to reach
- Ensure content highlight eco, ethical and accessibility considerations
- Purchase local where possible and collaborate with other local businesses
- Shout about Corporate Social Responsibility initiatives and sustainable practices
- Highlight investment in or access to technology such as EV chargers, solar panels etc

HOW WE FIND & BOOK HOLIDAYS IS CHANGING

Behaviour and tech trends



Booking trends

The path to purchase is complex and not linear

141

On average, travellers view
141 pages of travel content
in the 45 days prior to booking

Technology trends

Social media is a key part of the search journey

87%

... of millennial travellers consult **social media** for inspiration. *

40% of young users used TikTok or Instagram, to find a place for lunch. **

Technology trends

Video is dominating consumer media

> 2.6 BN

YouTube is the second most popular search network,
with >2.6 billion monthly active users



Booking trends

Visitors are increasingly booking ahead

67%

of global travellers book activities and experiences online **ahead** of travel *

13K+

activity tickets sold via Expedia in 2023 **up 55%** on 2022 **

83%

of Gen Z say it is important that they can book their trips **entirely online** *

180+

Expedia searches for **180+ days** are growing over 10% WoW (Dec) for Scotland **

Booking trends

Role of travel trade

73%

of long-haul travellers book some or all elements of their holiday as part of a package

51%

of short-haul travellers book some or all elements of their holiday as part of a package

55%

of packages are booked through specialist tour operator or travel agent

The 4 pillars of VisitScotland's Business Advice

Supporting industry to drive future business success, growing the value of tourism to Scotland.

PRODUCT & DISTRIBUTION DEVELOPMENT

Responding to consumer trends and changing expectations
Supporting businesses to be discoverable and bookable.
Internationalisation – working with the travel trade

RESPONSIBLE TOURISM

How you can make your business more sustainable
Creating a climate action plan
How to be an accessible and inclusive business

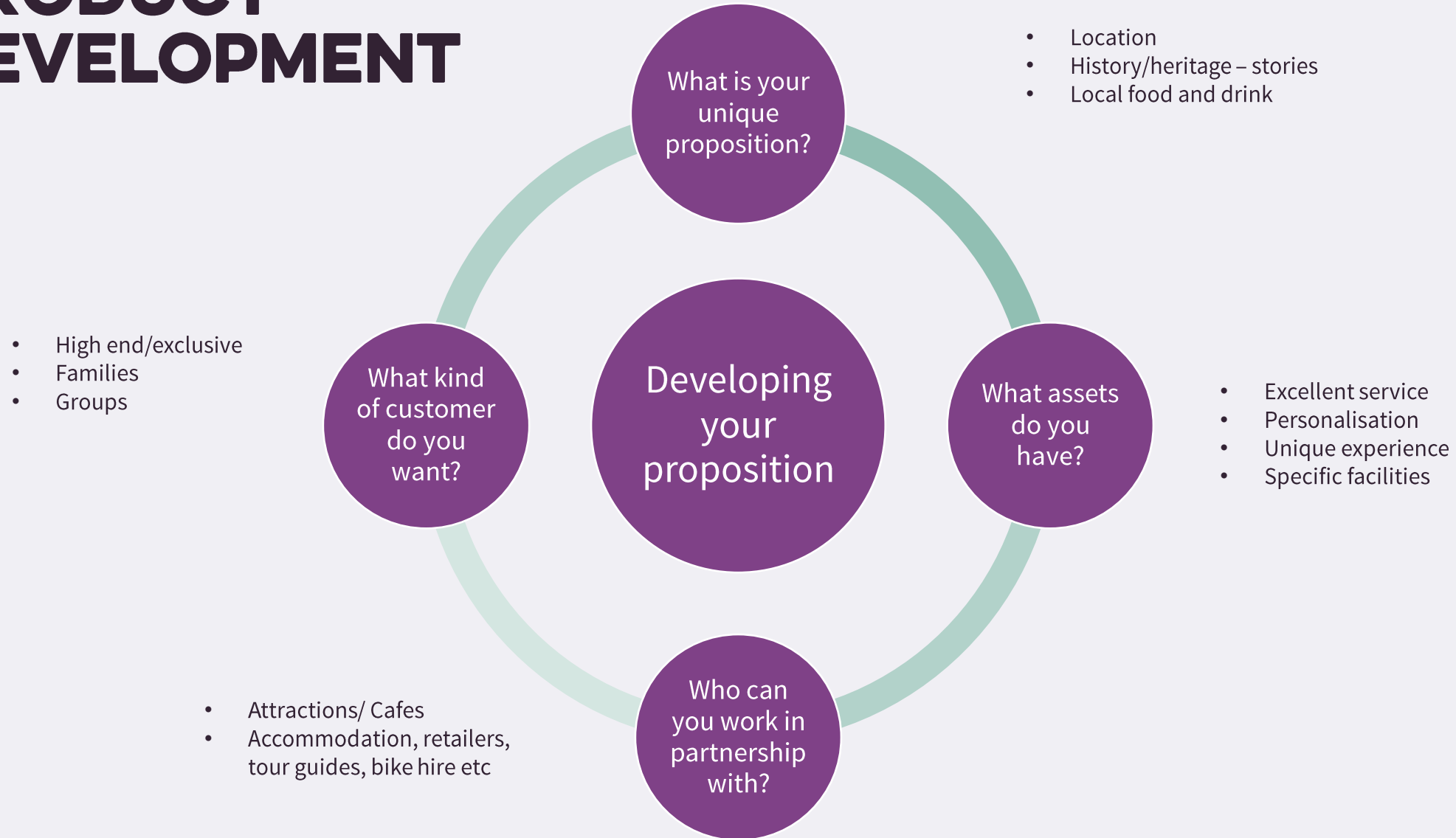
DIGITAL SKILLS

How to improve your digital skills and enhance your online performance

QUALITY

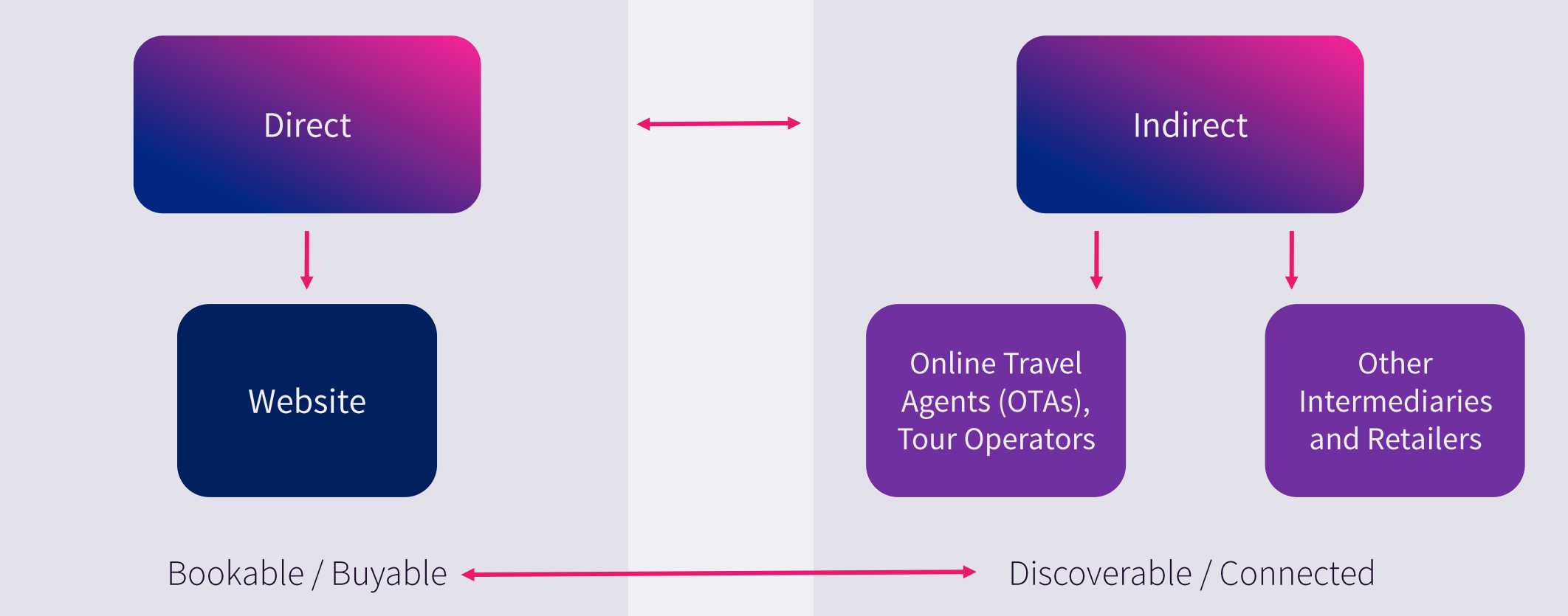
Responding to consumer trends and changing expectations
New, free-to-access quality advice programme

PRODUCT DEVELOPMENT



Routes to market

You need to be seen and be bookable





Support Scotland's transition to a **low carbon economy**



Ensure Tourism contributes to **thriving communities**

Ensure tourism in Scotland is **inclusive**



Support the protection, and considerate enjoyment of **Scotland's Natural & Cultural Heritage**



71% (+10% on 2021) of
travellers want to
make effort in
next year to travel
more sustainably²

78% intend
to stay in a
**sustainable
accommodation**²

49% believe
there **aren't**
enough sustainable
travel **options**¹

61%
pandemic has
made them
**want to travel
more
sustainably**¹

31% said
that they **didn't**
**know how to
find them**¹

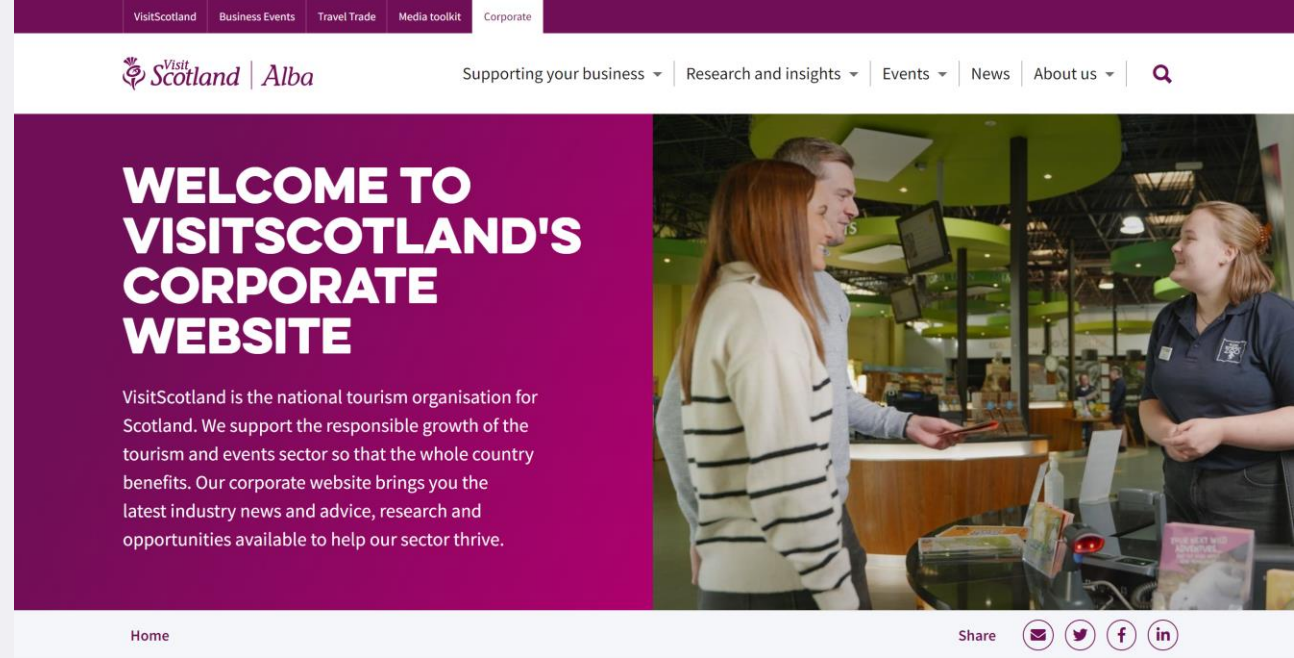
Source: Booking.com Sustainable Travel Report 2021¹& 2022²

Supporting you in those next steps


New Climate Action Planner

This month will see the launch of a new and enhanced Climate Action Planner and Toolkit

- A new tool to assist businesses with the calculations of their direct and indirect emissions to build a snapshot of their total carbon footprint
- The planner will help you prioritise quick win actions that will be little to no cost but will feed into longer term actions
- Along with the new planner we have also launched new guidance and toolkit to assist businesses in developing responsible itineraries for their visitors







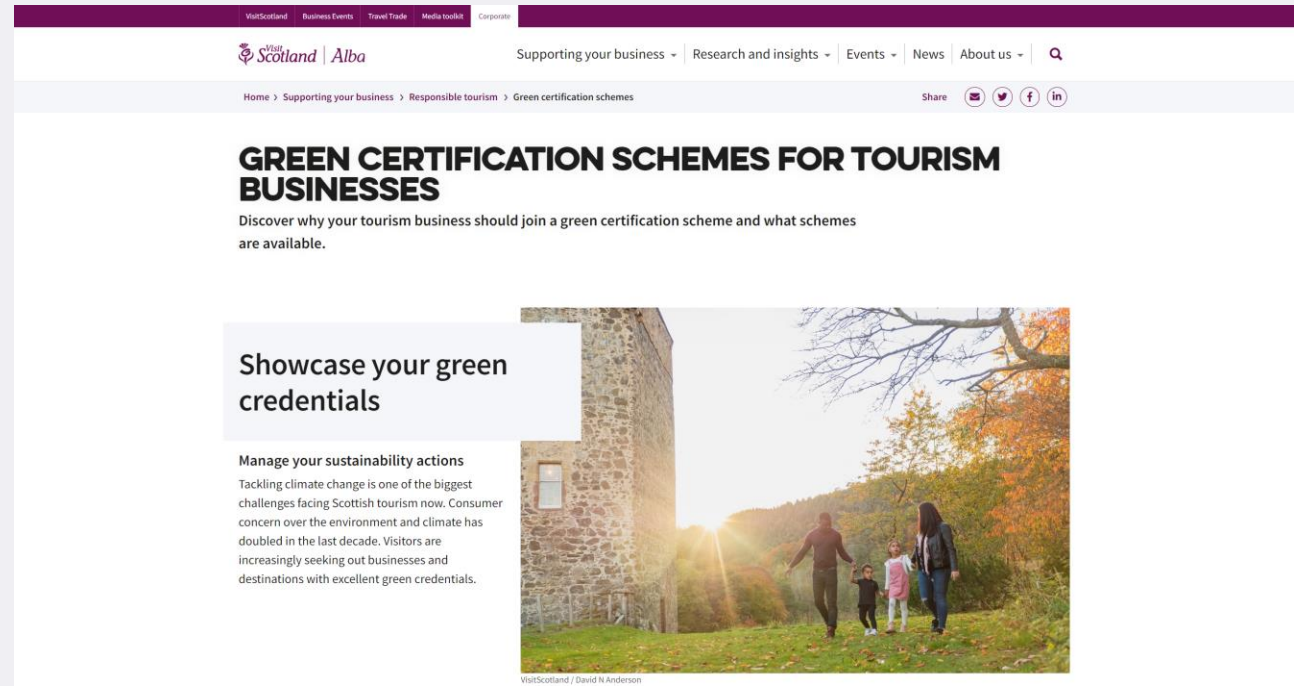
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Supporting your business ▾ | Research and insights ▾ | Events ▾ | News | About us ▾ | 


WELCOME TO VISITSCOTLAND'S CORPORATE WEBSITE





VisitScotland is the national tourism organisation for Scotland. We support the responsible growth of the tourism and events sector so that the whole country benefits. Our corporate website brings you the latest industry news and advice, research and opportunities available to help our sector thrive.

Home Share    



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Supporting your business ▾ | Research and insights ▾ | Events ▾ | News | About us ▾ | 


Home > Supporting your business > Responsible tourism > Green certification schemes Share    

GREEN CERTIFICATION SCHEMES FOR TOURISM BUSINESSES

Discover why your tourism business should join a green certification scheme and what schemes are available.

Showcase your green credentials

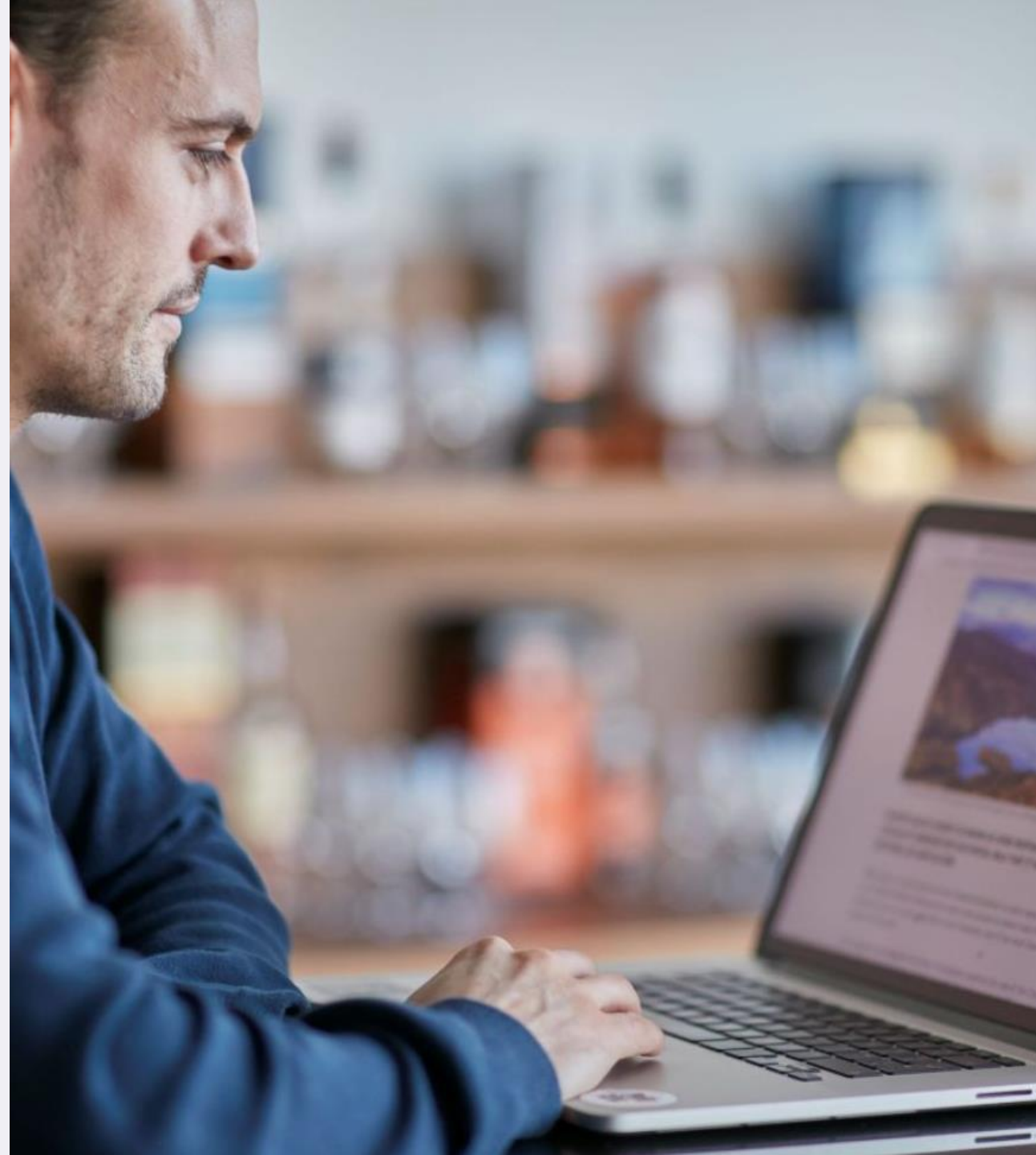
Manage your sustainability actions
Tackling climate change is one of the biggest challenges facing Scottish tourism now. Consumer concern over the environment and climate has doubled in the last decade. Visitors are increasingly seeking out businesses and destinations with excellent green credentials.



VisitScotland / David N Anderson

DIGITAL SKILLS

- Essentials of digital marketing
- Get started with digital marketing
- Improve your online performance
- Know your customers



DIGITAL SKILLS

Learn how to improve your digital skills and enhance the online performance of your Scottish tourism business.

Six tips on improving your social media presence →

Using Tripadvisor for your tourism business →

Using Facebook effectively →

Online travel agents →

Understanding the online user journey →

Creating good content to promote your business →

Using email marketing to improve your performance →

Using video to improve your marketing plan →

Using influencer marketing to promote your business →

The importance of using good imagery online →

How Google Business Profile can benefit you →

How to choose an online booking system →

QUALITY & BUSINESS ADVICE

- VisitScotland's Quality Assurance (QA) schemes will come to an end on 31 March 2025.
- Decision informed by Strategic Review and in response to changing consumer and business landscape.
- New, free-to-access business advice programme to be developed, with quality embedded and a focus on continual improvement.
- **Transition period over 2024/25:**
 - Retiral of the QA Schemes (now closed to new entries)
 - All current gradings will remain in place until 31 March 2025
 - No charge to participants in 2024/25



QUALITY & BUSINESS ADVICE

We will:

- Continue to play an important role in **providing quality advice to businesses**, helping to drive up the quality of Scotland's tourism product and the visitor experience.
- **Reach more businesses** with relevant insight and quality advice to ensure Scotland offers quality visitor experiences in all areas of the visitor economy.

How:

- By developing a new **Tourism Business Advice programme** that will connect businesses with tailored and timely business advice, prioritising a more streamlined digital customer journey and quality digital content.
- By taking a place-based approach, we will ensure that we realise the sector strengths & harness the **distinct opportunities of each destination**.
- Ongoing engagement with stakeholders and industry to help shape and inform our business advice programme.



Key Takeaways

Be Distinctive

Tell your **story** and showcase what makes you unique and compelling

Be Discoverable

Be present and stand out across touch points to **inspire early and often**

Be Inclusive

Tailor your offering to meet the needs of the **individual** and maximise **value add** opportunities

Be Collaborative

Consider where **partners** can maximise your offering, extend your reach and improve your impact

Be Bookable

Make sure you are bookable through multiple **direct and indirect** routes, with accurate and up-to-date listings, rates and information





THANK YOU

Any questions?