Visit Scotland | Alba™

People, Place & Creative Power

Scotland's competitive advantage

Vicki Miller, Chief Executive (@vickimillerVS)

Our Visitor Economy

The cornerstone of Scotland's economy

Our Global Success story

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Foundational and growth sector

£11.4 billion

visitor spend (2024)

5.4%
total economy (GDP)

#1

single largest employer, with

245,000

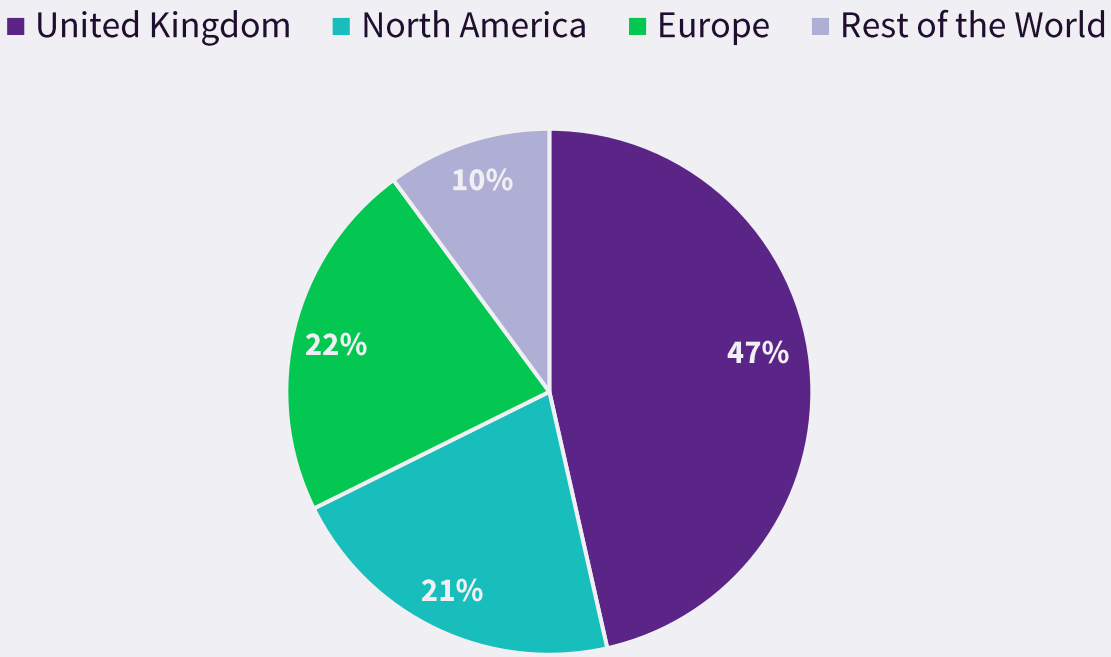
jobs (2024) across

>16K

businesses (2024)

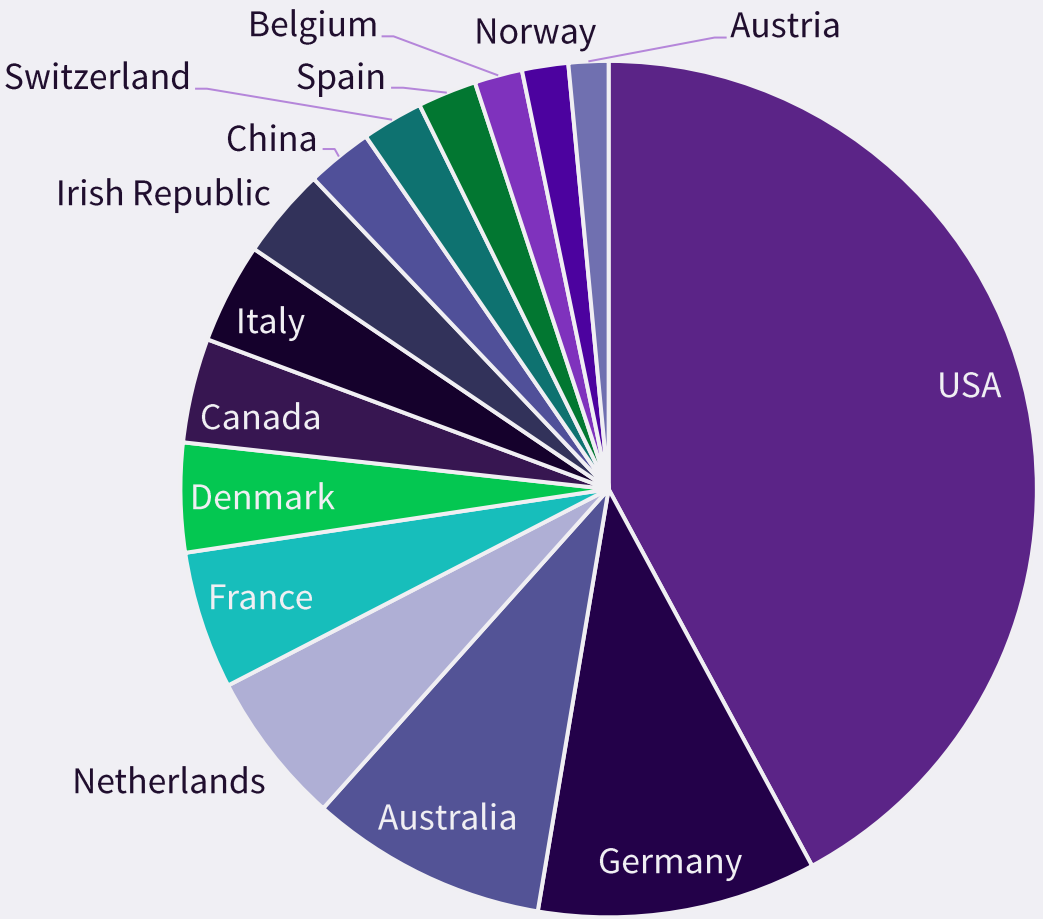
Where is our visitor spend coming from?

Spend in 2024



Both domestic and international expenditure increased from 2023 to 2024. Continuing a trend set in 2023, spend by international visitors in 2024 was higher than spend by domestic visitors.

Spend by Top 15 International Countries



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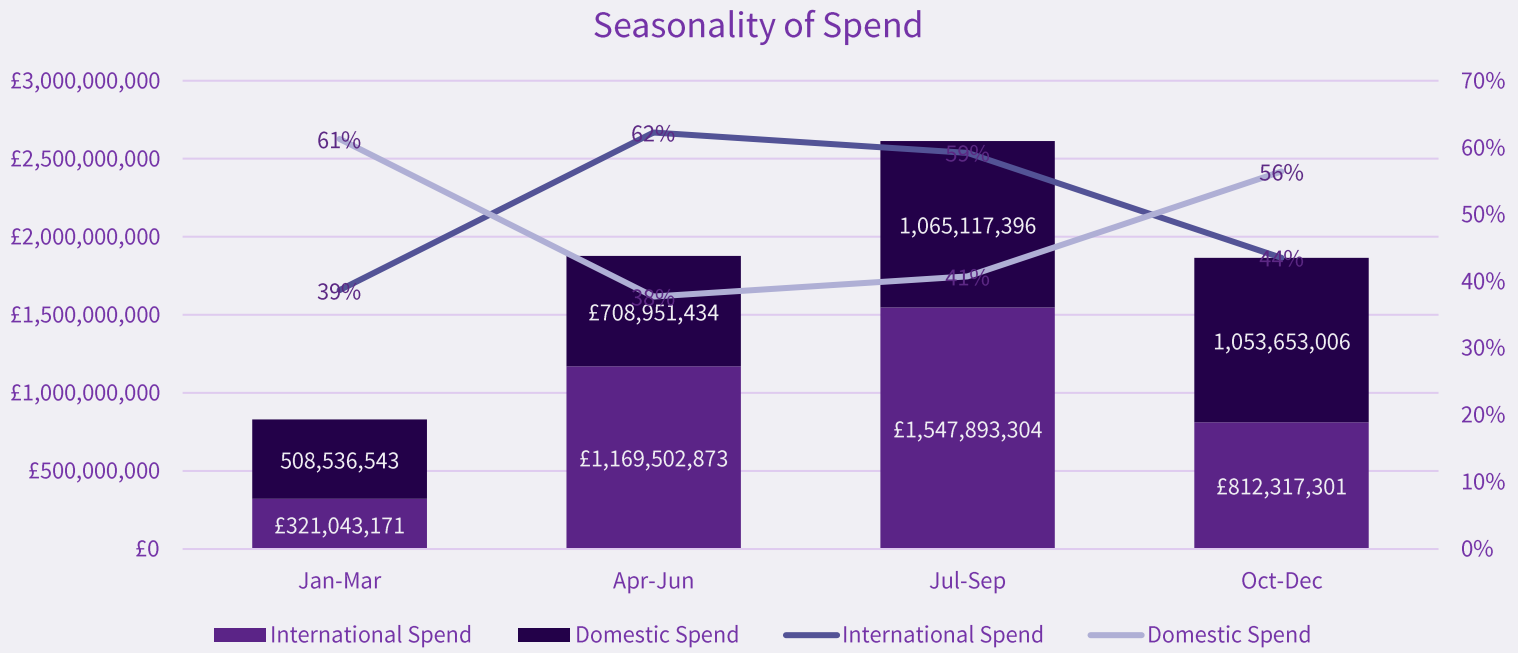
Sources: IPS, GBTS (2024)

When are visitors spending in Scotland?



Europe Commission (Berlin, Oct 2025) provided the below comparator:

1 in 3 stays in Europe happen between July and August.

- Just over a third (36%) of spend (domestic and international) is between July and September
- Continued reliance on domestic market for out-of-season visitor spend (Q1 and Q4) - a position that is flipped for Q2 and Q3

Changing economic value

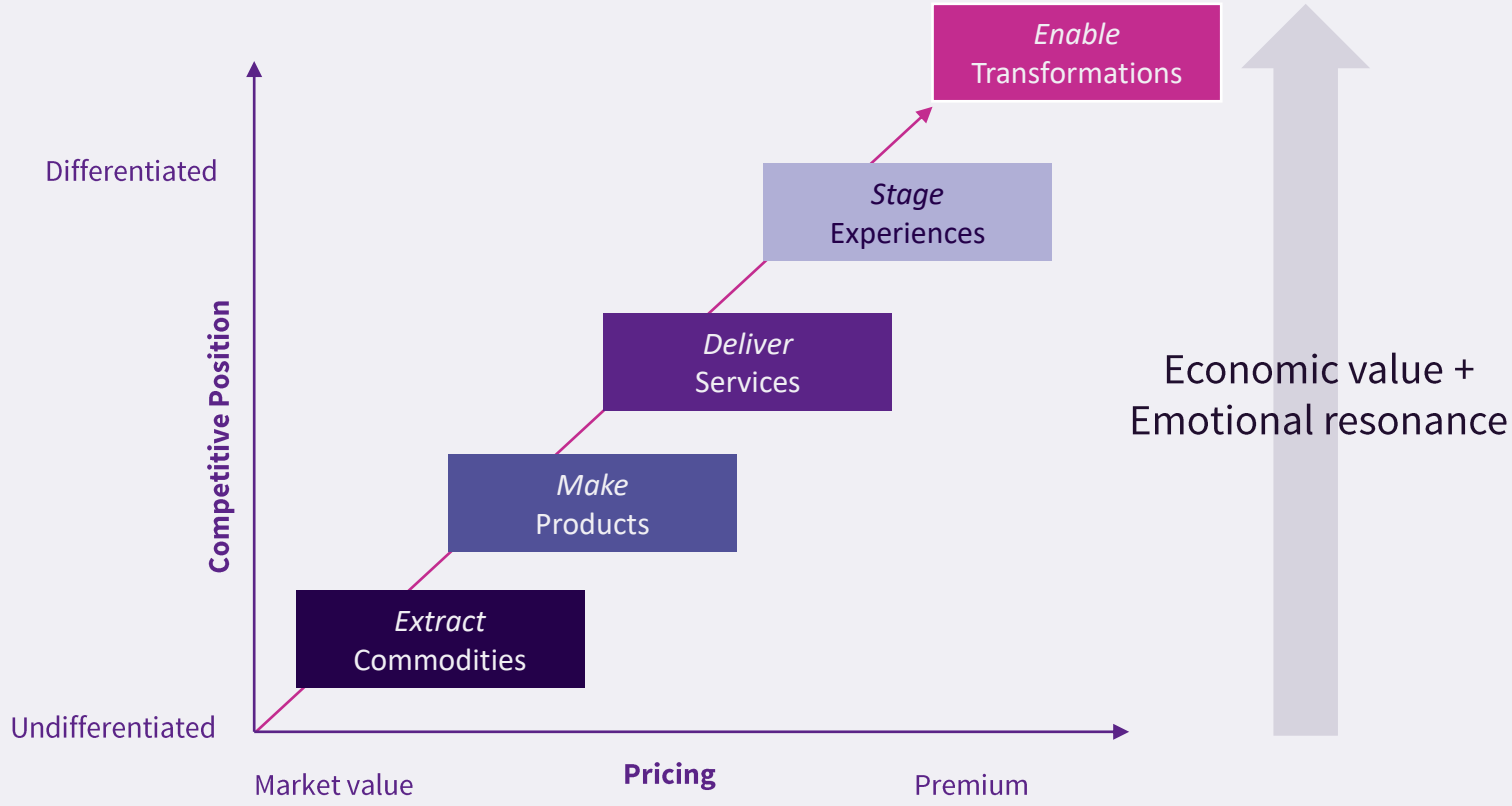
What do consumers want?

Over centuries, we've developed through:

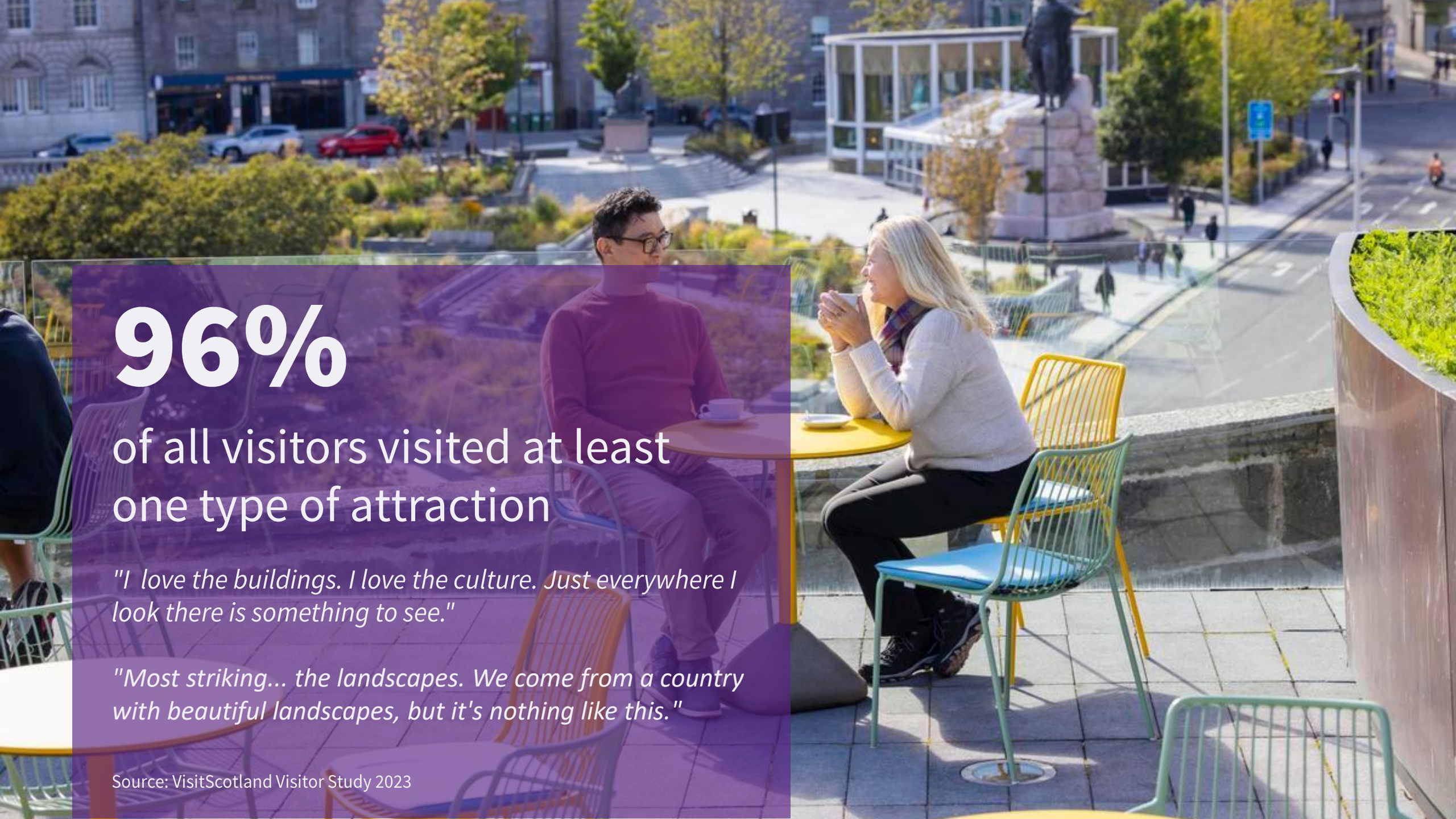
- Extracting and moving **raw materials** to
- Making goods and **products** to
- Delivering **services** to
- Staging **experiences**

What's next?

- Enabling **transformations**
- Opportunity: 3-5% growth in global travel activity *(UNWTO 2025)*



Source: Pine & Gilmore 1999; Schänzel 2019



96%

of all visitors visited at least one type of attraction

"I love the buildings. I love the culture. Just everywhere I look there is something to see."

"Most striking... the landscapes. We come from a country with beautiful landscapes, but it's nothing like this."

Source: VisitScotland Visitor Study 2023

71%

of visitors rated their experience in Scotland as a 9 or 10 out of 10

"People are welcoming, nature fascinating and culture rich and well organized in museums and historical sites. You are a fantastic people, in balance with nature and immersed in a fairytale landscape."

Source: VisitScotland Visitor Study 2023

72%

of visitors said Scotland is an open and welcoming destination

59%

of visitors said their trip to Scotland positively impacted their wellbeing

Source: VisitScotland Visitor Study 2023

Social proof drives conversion
9/10 travellers read reviews before buying or booking

Human connection creates memories
Nearly all positive reviews mention individuals (i.e. a guide) by name

Picture yourself here
55% of frequent travellers say real photos or videos of the activities help them make decisions

Source: GetYourGuide Trend Tracker Spring 2025

53%

of visitors are now conscious of tourism’s impact on local communities as well as the environment and are making alternative choices

39%

of visitors seek advice on travel at other times of the years

36%

of visitors visit alternative destinations

Source: Booking.com research April 2025

Where to next?

How do we continue to drive the success of our visitor economy

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Shaping a visitor economy that is rooted in people and place – how we will collectively drive success

1. **Creativity** will drive our differentiation.

2. Community is our co-creator – experiences are rooted in **real places, real people, and authentic voices.**

3. Developing our offer to create **meaningful and memorable experiences** with storytelling at the heart.

4. **Baking Sustainability & Inclusion into our offer and our stories**. The future is low-impact, high-value, and shared benefit.

5. Collaboration is our **competitive edge.**

6. **Digital & AI will open doors** – we can transform how are stories are told and experiences are delivered. Using social media and digital platforms to tell deeper, community-rooted stories.

7. **Values are our superpower.** Your business is part of Scotland's National Story. Make your values visible: local sourcing, fair pay, cultural respect, community giveback.

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VisitScotland's Strategy – driving the visitor economy to grow its value

How we will support you

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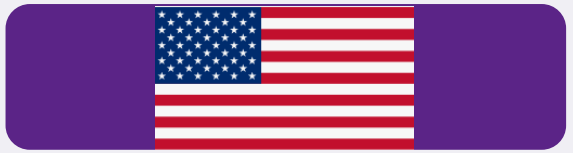
VisitScotland is committed to:

- Re-invigorating the domestic market
- Growing our share of inbound travel
- Working with ASVA to tailor advice & support
- Sharing your stories

Autumn-Winter 25-26 campaign – Growing our share of inbound travel



NBC

Expedia

Skyscanner

CALEDONIAN SLEEPER

LONDON & PARTNERS

Expedia

Tripadvisor

METRO

News UK

THE SCOTSMAN

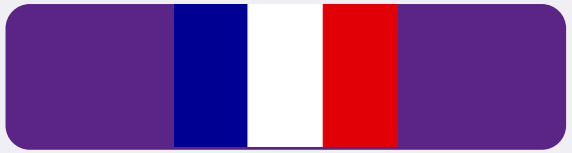
LNER

AVANTI WEST COAST

HISTORIC ENVIRONMENT SCOTLAND

CALEDONIAN SLEEPER

RSPB



Tripadvisor

Skyscanner

Tripadvisor

Skyscanner

DFDS

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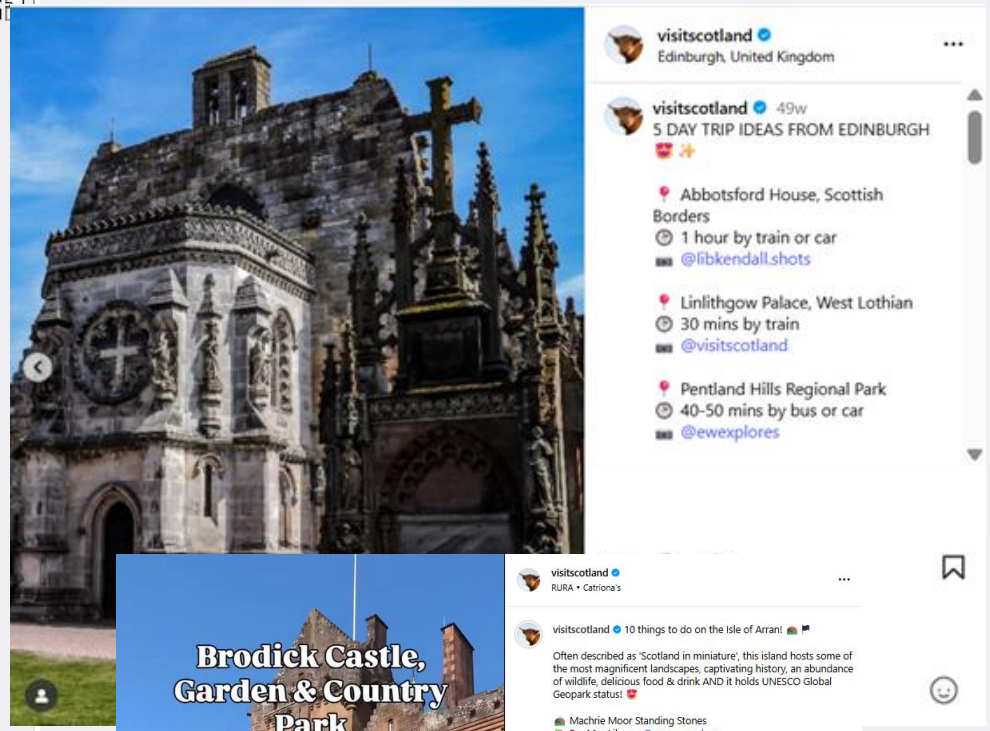

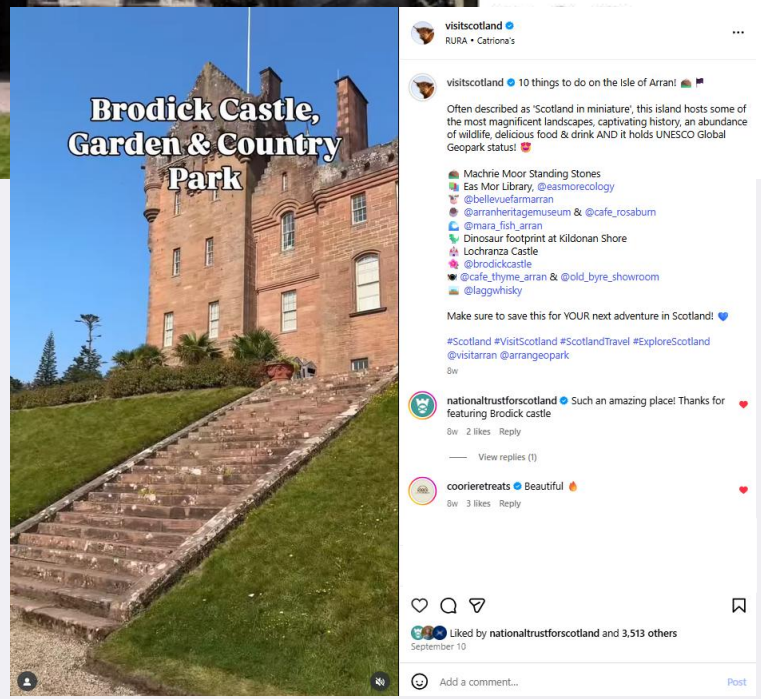

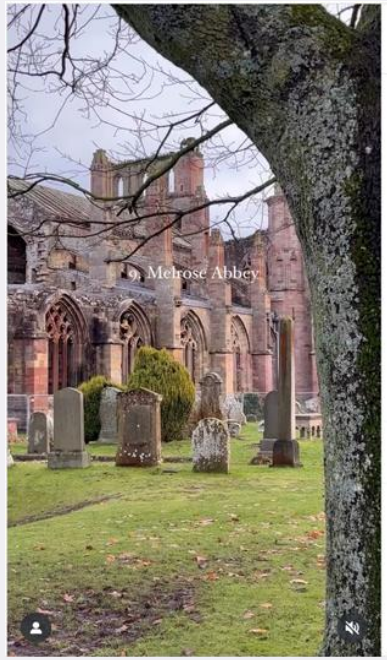

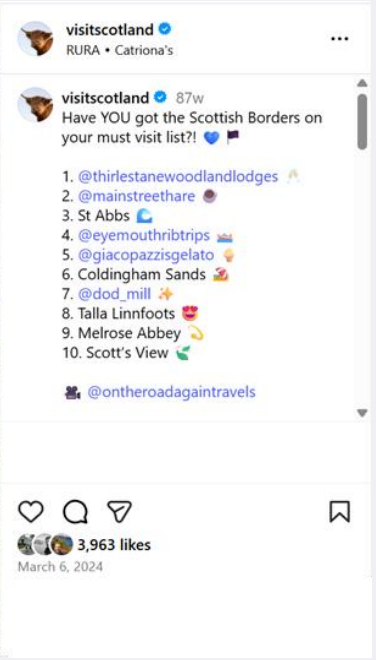

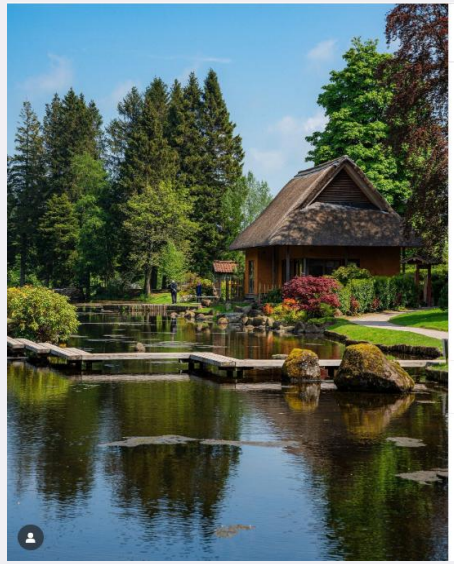

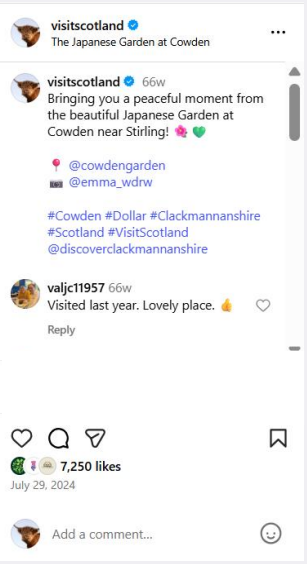

160m social reach

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Authentically Telling Your Story

Created For Scotland ▶ Play all

Slow travel on a Scottish Island | Book shopping, cos...

Caroline McQuistin
27K views • 1 month ago

A Week in Scotland || fishing villages, books & Celtic...

Ruby Granger
111K views • 3 months ago

Edinburgh's Best Restaurants: Where Chefs Eat

TOPJAW
253K views • 1 year ago
Subtitles

Abandoning our van in Norway (we made a HUGE...

Craig and Aimee | Kinging-It
302K views • 2 years ago

72m video views

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71% of travellers are influenced by video; 59% of travellers said YouTube content positively influenced their plans

Advice and Support for Every ASVA Member

A full package of support

Our year-round programme reaches businesses through:

- tailored digital advice and support on a range of topics
- a programme of webinars and workshops
- networking and peer-to-peer learning opportunities
- marketing advice and opportunities
- advice on climate action planning and responsible practices

Business Support Hub	Webinars, workshops and seminars	Travel distribution and working with travel trade
Tailored email programme	Business Essentials – Bitesize Webinars	Peer to peer learning through case studies
Business Enquiry and Support team	EventScotland funding	Travel trade event readiness workshops
Business Development Missions	VisitScotland Connect	Tailored sector support

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Helpful resources and links

Audience insight reports

Latest Research | VisitScotland.org

Why People Choose Scotland I VisitScotland.org

Industry toolkits

Media Library - Visit Scotland Media Toolkit

Marketing calendar

VisitScotland's Marketing Calendar | VisitScotland Business Support

Share your news with us - #visitscotland

travelpr@visitscotland.com
content@visitscotland.com
social@visitscotland.com

Grow and promote your business

Bitesize Webinars - series of short webinars on topics inc. social media & online travel agents

Training and Events - improve your business skills, and browse tourism industry events taking place across the country

Sign up for the Business Support newsletter for the latest updates, advice and tips straight to your inbox.

Business Support Newsletter | VisitScotland Business Support

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Thank you
Vicki Miller | CEO, VisitScotland | @vickimillerVS