

Economy and Fair Work Committee

VisitScotland follow up information

Thank you for the opportunity to give evidence to the Committee on 3 September as part of the session on Scotland's tourism industry. We would like to follow up and provide further information on topics raised during the session.

Firstly, an update on our approach to market development and our work to promote Scotland, including the role of our consumer website visitscotland.com, which is just one part of our integrated marketing activity.

VisitScotland is in a unique position to drive economic growth and grow the value of the visitor economy for Scotland. The impact of our work is significant (2024/5 figures):

- £73.5M Net Economic Impact (NEI) of VisitScotland's multi-channel marketing
- £18 generated for the economy by every £1 of our marketing investment
- £8.1M NEI of route development work
- £152M NEI of event development programmes
- £21.6M NEI of business events BID Fund

The work we do to promote Scotland has never been more important. Increased global competition means we must continue to ensure Scotland is top-of-mind for travellers. Our approach is end-to-end, from our work with businesses, supporting product and business development, to promotion of Scotland to consumers and intermediaries (such as tour operators). This ensures we profile all regions of the country and the unique products and experiences on offer.

Based on data and insights, we target future visitors as they search for travel inspiration and begin to research a holiday. Research shows this is the point where we can have greatest impact and influence. We then convert these lookers into bookers via marketing with tour operators, online travel agents, and transport operator partnerships.

Our market development activity involves close partnership working. Importantly we work in partnership with our destination partners around the country to inform the product we promote and the seasonal focus aligned to their unique opportunities and challenges. Organisations such as South of Scotland Destination Alliance, Glasgow Life, VisitAberdeenshire also partner in our activity. We also work with a wide range of other partners including Historic Environment Scotland, National Trust for Scotland, National Museums and others, across our activity.

As a public body, we must invest our resources into the activities which can most effectively grow the value of the visitor economy. To support this, post-covid we began our strategic change programme to review the activities we deliver and ensure we are future fit, supporting the ambitions of public service reform.

We know visitor and consumer behaviour is changing, with visitors often planning and booking all aspects of their trip in advance of travel. In response to this, and the need for us to ensure we drive the greatest return from our investment, we are changing the way we deliver information to

visitors. We are closing our iCentre network and focusing on growing Scotland's discoverability through digital channels and intermediaries.

We invest in the channels we know visitors are using to influence their travel decisions before they get to Scotland and often before they've even decided which destination to travel to. By encouraging them to stay longer, travel year-round and explore more while here, we seek to increase visitor spend and develop a sustainable approach to tourism and events.

Typically, consumers will now take in a wide range of research and information prior to making a purchase, making it important for us to deliver our activity across a range of information touchpoints, such as social media, influencer and third-party content channels, in the press, through email marketing and targeted campaigns. For example, we are investing in our PR, social media and influencer activity to reach audiences where they are spending time online, absorbing information, forming opinions and increasingly seeking fresh travel inspiration and ideas. We're producing more video content with online and social media audiences in mind, in response to changes in the way people search online, social platforms and content consumption.

Our visitscotland.com website is one part of our multi-channel marketing mix. The site plays a key role in informing and inspiring visitors, helping them to piece together what a holiday in Scotland might look like, while also effectively showcasing the spread of tourism businesses and events across the country, year-round. For example, we are developing more immersive video and imagery that helps website users get a sense of place and how it will feel to visit Scotland. And as we seek to connect users with more businesses and accurate information, we continue to look at ways to support businesses to enhance their online profile and make this more visible and accessible through our website.

As part of our ongoing site development, we'll update our website content and structure to remain visible and competitive online as search habits continue to evolve. The site's authority, expertise, accessibility and trust are vital for Scotland's future discoverability in both global search engines and generative AI powered platforms.

Secondly, we would like to update the committee regarding visitors' views of Scotland, including value for money, and our approach to business support.

In response to questions around value and price, a June 2025 [destination sentiment study](#) by Tourism Ireland provides further recent evidence in relation to visitor sentiment and Scotland:

- Value for money when planning a holiday remains top of mind for visitors (circa 8K sample).
- More visitors perceive Scotland to be value for money than France, England, Northern Ireland, Denmark, or Norway. Ireland edges Scotland by +1 percentage point.
- Over half of visitors surveyed perceive Scotland to be 'premium, good value and worth it', which is +2 percentage points ahead of Ireland and +13 percentage points ahead of Northern Ireland.
- Scotland is perceived as a sustainable tourism destination (56% agreeing; equal to Denmark and ahead of France, Northern Ireland and England).

Our most recent Scotland Visitor Survey (2023) found visitors are generally very positive about their holiday or short break experiences in Scotland, given the level of time, planning, and cost they have invested to personalise their trip:

- 71% of visitors rated their experience in Scotland as a nine or a ten on a ten-point scale
- 82% of visitors are likely to recommend Scotland (nine or ten out of ten)
- 80% of visitors are quite or very likely to return to Scotland in the next five years

Nine or ten scores on a ten-point scale show genuine satisfaction and can foster loyalty. The challenge is to enhance every visitor experience to encourage more people to give the highest score.

We use data and insights from a range of sources, including the visitor survey, to inform our work. In the past year, we have refreshed our Business Support Programme to offer a year-round programme of free-to-access support, helping more tourism and events businesses grow and develop the quality of their offering. This business support we offer complements the market development activity outlined above and includes tailored webinars, workshops and events to support entrepreneurialism, trade and business growth.

Our new Business Support Hub website is the online part of this programme, offering a free-to-access resource for businesses. It provides support on tourism and events topics which we know are important to businesses. These include sector-specific advice on visitor trends and demand, quality, sustainability and climate action and critically how to reach new audiences and markets. This both helps businesses to develop experiences and products that meet the expectations of visitors and adapt to new market opportunities. Our Business Support Hub content is developed by experts, working closely with partners, sector and industry groups to ensure the support will be useful to businesses.

**Prepared by VisitScotland
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