

Written submission from Visit Scotland, 28 September 2026

Pre-budget scrutiny 2027-28

Europe, External Affairs and Culture Committee

Introduction

VisitScotland welcomes the opportunity to contribute to the Committee's pre-budget scrutiny of funding for external affairs.

The visitor economy plays a central role in delivering Scotland's international ambitions. It not only generates economic value and employment across the country, but the visitor economy also strengthens Scotland's international profile, connectivity and influence. By attracting visitors, supporting international business relationships, and showcasing Scotland on the global stage, tourism and events act as a practical delivery mechanism for the [Scottish Government's International Strategy](#)¹.

VisitScotland acts as a shop window to Scotland. We present the country's destinations to international audiences, converting global interest into visits, investment and enduring connections. Through our marketing, trade development, connectivity and events activity, we help deliver Scotland's wider economic and international ambitions.

As the Committee considers future investment in Scotland's international footprint, we believe the visitor economy should remain a core delivery mechanism of Scotland's external affairs agenda and as a key partner within the evolving Scotland House network.

Delivering Scotland's International Strategy

Tourism and events are among Scotland's most powerful instruments of international engagement and strengthening Brand Scotland's global reach. They do far more than attract visitors; they create economic value, strengthen international relationships, enhance Scotland's global reputation and showcase the country on the world stage.

Their contribution to economic growth is substantial. Scotland's visitor economy contributed £11.4 billion to the Scottish economy, while VisitScotland's activity generated an additional £244 million in net economic impact during 2024/25. International visitors are particularly important, accounting for 54% of all overnight visitor spending and reinforcing tourism's role as one of Scotland's most significant export sectors - tourism related jobs now account for 9.1% of all employment in Scotland and is the third highest employment sector. Business events help position Scotland as a global centre of excellence in sectors such as life sciences, medicine and digital innovation by bringing together industry

¹ <https://www.gov.scot/publications/scotlands-international-strategy/>

leaders, researchers and experts through international conferences.

They also deliver significant economic benefits, with activity in 2025/26 generating leads estimated to be worth £151 million in Gross Economic Activity and £59 million in GVA.

Tourism and events also play a critical role in enhancing Scotland's global profile and influence. Scotland ranked 12th globally for tourism in the Anhalt Nation Brands Index 2024, reflecting the strength of its international reputation. Global marketing campaigns and partnerships with internationally recognised brands such as Amazon, Disney, Sony, Meta and National Geographic have helped position Scotland in front of audiences around the world. Major events provide a powerful platform for international visibility. Scotland's portfolio of world-class sporting and cultural events generated more than 6,000 hours of international broadcast coverage, while a strong pipeline of future events, including the Tour de France Grand Depart 2027, UEFA EURO 2028 and ambitions around the FIFA Women's World Cup 2035, will continue to amplify Scotland's profile internationally.

A key strength of tourism and events is their ability to build and strengthen international connections. VisitScotland's international activity spans 17 overseas markets and has connected hundreds of Scottish tourism businesses with international buyers and partners. In 2026, our travel trade show VisitScotland Connect facilitated more than 10,200 business meetings between 289 Scottish suppliers and 330 buyers from 20 countries. £10M worth of additional bookings are forecast as a result of these meetings, supporting growth in international trade. At the same time, investment in international connectivity has supported new direct air services from Boston, Montreal and Philadelphia, strengthening links that benefit tourism, trade, investment and wider international engagement.

Importantly, the benefits of this international activity are not confined to Scotland's major cities but are felt in communities across the country. Through the Rural Tourism Infrastructure Fund, VisitScotland leveraged £20.6 million of additional investment to support 85 projects across Scotland, helping destinations develop the infrastructure needed to manage and benefit from sustainable visitor growth. Major events have also delivered significant regional impacts. The Tall Ships Races Aberdeen 2025 attracted almost 500,000 visits and over 2,000 international crew members, while the Orkney International Island Games 2025 generated £4 million for the local economy. 42% of spectators came to Orkney for abroad and the event left a lasting legacy through enhanced facilities, volunteer development and community capacity-building.

Taken together, these outcomes demonstrate how tourism and events make a direct and measurable contribution to Scotland's international ambitions. They drive economic growth, strengthen Scotland's global reputation, create enduring international relationships and attract investment, while ensuring that the opportunities created through international engagement deliver meaningful benefits for businesses, destinations and communities throughout Scotland.

Supporting the Scotland House Network

The Scottish Government's plan to expand the Scotland House network to more than 40 locations is an opportunity to align Scotland's international objectives with the visitor economy. The network on its own is not enough; it requires a planned market investment and engagement programme that is properly resourced. Expanding the network also requires an integrated, joined up working and incremental market awareness activity in order to drive impact. A cost-effective way to develop that is through partnerships with existing partners in markets, something that VisitScotland already has.

We already work with government, Scottish Development International and international networks to promote Scotland in priority markets. International audiences engage with Scotland through a combined proposition spanning tourism, business, culture, education, innovation and investment. Tourism and events often provide the first connection, building affinity that can lead to future investment, study, trade and cultural exchange.

It remains to be seen exactly what final proposals mentioned in the [Programme for Government \(PfG\)](#)² may look like, but we consider tourism expertise and destination marketing capability should be embedded in any future model. This will maximise economic return and ensure Scotland presents a coherent offer to visitors, investors, businesses and talent. As a critical partner strengthening Scotland on the international stage, we welcome opportunity to engage further as proposals are developed.

Budget Priorities for 2027-28

To continue delivering impact and support Scotland's international ambitions, VisitScotland identifies four key priorities for the 2027-28 Budget.

1. Investment in International Market Activity

International tourism remains highly competitive. For example, in 2025 Ireland spent

£5.5M in the UK market and £7.3M in the US market, representing 41% and 34% of the competitive spend in each destination. Maintaining Scotland's visibility in priority global markets requires continued investment in marketing, trade engagement, digital activity, media partnerships and destination promotion.

2. Connectivity and Route Development

International connectivity is fundamental to Scotland's economic growth, international competitiveness and global engagement. The PfG identifies tourism and global connectivity as important contributors to economic growth. It commits

² <https://www.gov.scot/publications/programme-government-2026-2031/>

to continuing support for international air connectivity through VisitScotland in order to encourage international cultural visits, support international trade and maintain links with Scotland's diaspora.

Targeted funding has successfully supported route development and market stimulation activity, contributing to new services from Boston, Montreal and Philadelphia, alongside future growth opportunities such as the Eurowings Hanover-Glasgow route. In a fiercely competitive market place, our activity is vital to sustain existing routes as well as developing new ones. Continued support for connectivity programmes should remain a budget priority to grow international demand and strengthen Scotland's global accessibility, both integral elements to the work of the Scotland House Network.

3. Major Events and International Profile

Sustained investment will be required to maximise economic, reputational and legacy benefits from major and mega events. This directly supports PfG commitments relating to Scotland's events pipeline through 2030 and the ambition to capitalise on opportunities arising from the events pipeline. Investment is also required for international promotion, business engagement, legacy planning and coordinated activity through Brand Scotland and the Scotland House network.

4. Business Growth and Export Development

Tourism businesses remain central to Scotland's international competitiveness. Continued support for international trade engagement, market readiness programmes, business events activity and regional destination development will help Scottish businesses access new markets, increase productivity and grow export earnings.

Conclusion

Tourism and events continue to demonstrate value as a highly effective delivery mechanism for Scotland's International Strategy. Through our activity VisitScotland is generating measurable economic returns, strengthening Scotland's global reputation and ensuring the benefits of internationalisation are shared across Scotland's communities.

As the Scottish Government expands the Scotland House network and develops its international presence, tourism can make an increasingly significant contribution to achieving national economic and external affairs objectives. Continued investment in international connectivity, major events and Scotland's global presence will help deliver PfG commitments to enhance Scotland's global offer, strengthen international air connectivity, expand the Scotland House network and position Scotland as a world-leading destination. VisitScotland is uniquely placed to help translate those ambitions into measurable economic, reputational and international outcomes.