

VISITSCOTLAND CORPORATE PLAN

2024-25

CONTENTS

01	Foreword	3
02	Our Strategic Framework	5
03	Our people and our values	7
04	The Scottish visitor economy and the changing travel landscape	9
05	The enabling value of tourism and events in Scotland	12
06	Working in the wider context	14
07	Strategic change programme	16
08	Our people priorities in 2024/5	19



01

FOREWORD



FOREWORD



Chair
The Rt Hon. the Viscount Thurso

Chief Executive
Malcolm Roughhead OBE

Tourism is a force for good. It is at the heart of the Scottish economy; it creates jobs and sustains communities in every corner of Scotland.

It also acts as a showcase for Scotland, encouraging investment in a wide range of sectors.

The ripple effects of a strong, well-functioning tourism and events sectors can be considerable and they allow our dynamic industry to contribute - both directly and indirectly - to our shared ambition of a wellbeing economy.

Our Corporate Plan for the financial year 2024/25 sets out our strategic focus as we deliver our purpose to drive the visitor economy, growing its value in Scotland.

It comes at a time of significant change, with a difficult economic landscape and a climate crisis which is one of the most challenging issues for us to face. Consumer behaviour and the needs of businesses in both the tourism and events sectors have also changed, particularly since Covid and in an increasingly digital world.

Therefore, this year will see us focus on our digital-first strategy. We will embark on a strategic change programme to help us adapt to this new landscape and build on our excellent track record of evolving how we work to ensure we continue to make the greatest impact.

While the key focus will be our evolution as we look to the future, all the work we do in the next 12 months will pave the way for a three-year Corporate Plan.

We will continue to put our people first, focusing on the quality of our staff and the skills they can offer to help us deliver the Scottish Government's National Strategy for Economic Transformation and the national tourism strategy, Scotland Outlook 2030, National Events Strategy - Scotland the Perfect Stage 2024-2035. The challenges faced by the sector have been significant in the past few years, but our Corporate Plan underlines our commitment to making the best use of our funds to create better places for people to live, work and visit. This is responsible tourism in action, ensuring our industry contributes to thriving communities and plays its role in the journey towards net zero.

By building sustainable demand and supporting tourism and events businesses, we can help to make significant progress toward our shared ambition of being a world leader in 21st century tourism.

02

OUR STRATEGIC FRAMEWORK



OUR STRATEGIC
FRAMEWORK

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 and events in delivering the very best for our visitors, our businesses, our people, our communities and our environment.

To deliver on our purpose, vision and mission, we have created five pillars which inform and shape our activities each year.

- Stimulating demand
- Supporting tourism and events businesses
- Working collaboratively with our partners, including community, destination and sector organisations
- Enhancing our organisation insight, capability, planning and compliance
- Supporting and enabling our people



03

OUR PEOPLE AND OUR VALUES



OUR PEOPLE AND OUR VALUES

We recognise and value our people as the most important asset in achieving VisitScotland's commitments set out in our Strategic Framework. We employ motivated and energised colleagues, with the skills, behaviours, and competencies needed to deliver these commitments.

People Strategy

The VisitScotland People Strategy 2021-2024 remains relevant for the duration of this Corporate Plan.

The VisitScotland People Strategy aims to ensure we are:

- Considered an employer of choice in Scotland
- An exemplar in responsible and inclusive work practices
- An employer that embraces and celebrates diversity
- A progressive and flexible employer
- Acknowledged externally for the professionalism of our employees, the quality of their work and their contribution to Scotland

As an employer of choice, our work practices and culture reflect the dimensions set out in the Scottish Government Fair Work Framework. The six themes of our People Strategy ensure we meet the fair work principles of security, respect, opportunity, effective voice and fulfilment.

Attract – We are committed to being a progressive, responsible and inclusive employer of choice.

Lead – We support the growth and development of our leaders.

Nurture – We cultivate a culture that focuses on learning, promotes equality and the health and wellbeing of our workforce.

Engage – Our people-focused culture supports and drives high levels of staff engagement.

Model – We draw upon data and trends to support our decision making and shape our people services and workforce plans.

Reward – we recognise and reward our workforce for the work they do and the contribution they make.

Our Values



People-orientated - Our people are our most valuable asset. Each and every one of us has a voice and the power to make a real difference.



Responsible - We're committed to the development of responsible tourism practices and a net zero sector, by protecting Scotland's natural assets now and for future generations.



Collaborative - We embrace the ideas of others. Working together across the organisation and with our partners, allows diverse minds to meet driving innovation, transparency, trust and respect.



Innovative - We regard change as opportunity. Progression is at our core.



Outward-looking - By looking to the world to learn and better ourselves, we will take Scotland to new heights.



Ambitious - Through bold leadership, hard work and imagination we are relentless in the pursuit of new ways to inspire, engage and bring visitors to Scotland.

04

THE SCOTTISH VISITOR ECONOMY AND THE CHANGING TRAVEL LANDSCAPE





Tourism, hospitality and event businesses are now operating in some of the most challenging economic and geo-political times they have ever known.

The role of VisitScotland in providing industry guidance, stimulating demand and encouraging a more equitable distribution of visitor spend has arguably never been greater.

Business Operating Environment

Post Covid and post Brexit, the business environment has been extremely challenging with businesses having to adapt their models to the changing needs of visitors and the operating environment. Regulation, staff shortages and higher overhead costs have all impacted the bottom line.

Despite these challenges, Scotland's recovery has been relatively strong and has outperformed each of the other UK nations and other prominent visitor regions within the UK.

As we look to the future, VisitScotland will continue to adapt its business advice strategy to help businesses navigate the changing landscape. Combined with an increased focus on working with sector and destination partners to realise the unique strengths of each place, we will continue to support the development of quality destinations. Our work will also support the growth in sustainable and profitable businesses, increasing the number of new quality bookable experiences that will appeal to the markets and audiences that Scotland is looking to attract.

Our regional teams will also continue supporting the work of Regional Economic Partnerships, ensuring opportunities are leveraged for the visitor economy and contributing proactively to the development and delivery of local tourism strategies.

As an industry and an organisation, we are also facing the climate emergency. We will continue to invest in expert advice, guidance for businesses and partnerships with the travel industry to uphold our commitment to the Glasgow Declaration on Climate Action and achieve Scotland's net zero ambitions by 2045.

Market and Visitor Demand

Scotland's visitor economy is diverse in nature and geography. While some markets have returned, the overall pace and value of recovery has varied across Scotland. Our place-based focus will ensure we have oversight of capacity and sensitivity issues across Scotland, in order to tailor our core activities to help achieve local objectives.

Connectivity has played an important role in our international recovery and during 2023 we worked with partners and have seen a number of new direct routes into Scotland from the US and Canada. European connections have continued to improve across the year, although they are not quite back to pre-pandemic frequency. VisitScotland continues to collaborate with TransportScotland on route development opportunities, partnering with carriers to promote new and existing routes into Scotland.

While the volume and value of international visitors to Scotland in 2023 is up on pre-pandemic levels, 2023 has been more challenging in terms of domestic market growth, with a more cautious visitor seeking value for money and last-minute deals. Recent visitor volumes have been boosted by household savings built up during the pandemic, however, there is likely to be more pressure on household spending in future years from the ongoing cost of living crisis. Globally though, the appetite for travel remains strong and the opportunity is to target audiences in our priority markets who are more protected financially and who are actively searching online for travel experiences.

THE SCOTTISH VISITOR ECONOMY AND THE CHANGING LANDSCAPE



Scotland can also benefit from a growing ‘Experience Seeker’ market in 2024. Global consumer trends show an increasing appetite for authentic travel experiences including outdoor, culture and food and drink experiences. These are areas in which Scotland holds a particularly strong competitive advantage.

With greater hybrid working there is also growing evidence of business travellers extending their business trips to combine them with leisure travel and activities – “Bleisure”. As a globally recognised business tourism destination, this presents a unique opportunity.

Our US market will continue to drive headline growth in 2024 while our domestic and European markets will continue to support regional growth and seasonal spread. We also anticipate international arrivals being boosted by the return of our China market following the Approved Destination Agreement introduced in August 2023. In 2019, China was the most valuable outbound market globally, the fifth most valuable inbound market for Scotland.

Opportunities

Our data-driven tailored marketing and our work with the travel trade globally will ensure we keep Scotland top of mind and accelerate intentions into conversions and opportunity for Scottish tourism, hospitality and events in accordance with our ‘4s’ approach:

- Spread – spread of visitors through the year and across Scotland
- Spend – increased yield from each visit (added value, extended stay, local spend)
- Sustainability – improved environmental footprint of travellers protecting our natural and cultural heritage
- Satisfaction – connecting visitors with the breadth and depth of memorable experiences on offer across Scotland

We recognise the increasing importance of getting more information to more people on what Scotland has to offer ahead of a visit, in order to influence a more sustainable and higher value trip. Our digital-first approach to create, curate and distribute quality Scottish content in the channels visitors are using, along with our travel trade education programme, will therefore continue to be important aspects of our work in driving sustainable growth.

VisitScotland will also facilitate opportunities for Scottish businesses to work with the international travel trade in 2024 and capitalise on higher spending international visitors.

With an increasing demand for motorhome and camping holidays, we will continue to work with our visitor management partners to inform and inspire visitors before they get here. This will include how to travel responsibly, following the Scottish Outdoor Access Code, to leave no trace. Related to this, our work with national and local partners on local infrastructure plans, designed to enhance the visitor experience, will continue.

Our 2023 Visitor Survey findings will provide timely insight and regional data to inform planning going forward. This is the first comprehensive visitor survey post Covid to provide detailed feedback on the quality of the visitor experience and greater insight into our visitors. It will tell us why they chose Scotland, what they did, where they travelled, how they did their holiday planning and what channels they used for inspiration, planning and booking. While we continue to operate in a globally competitive and challenging economic and geo-political environment, VisitScotland is committed to working with our partners in the visitor economy to navigate change, capitalising on the many opportunities we have to position Scotland as a leader in 21st century tourism. In doing this, we will drive the visitor economy, growing its value to Scotland, while contributing to the vision of a wellbeing economy.

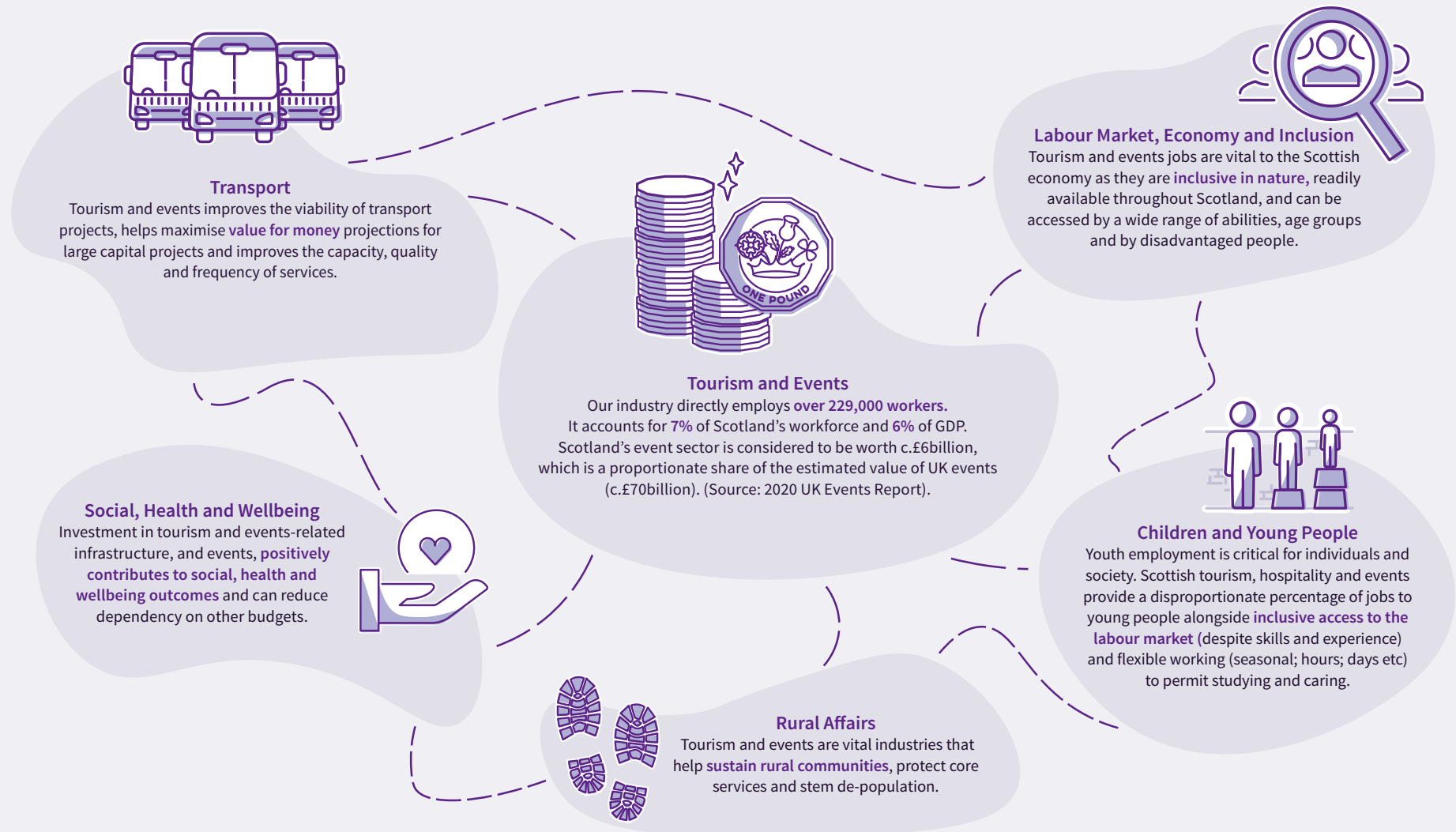
05

THE ENABLING VALUE OF TOURISM AND EVENTS IN SCOTLAND



THE ENABLING VALUE OF TOURISM AND EVENTS IN SCOTLAND

Investment in Scotland's tourism and events industries significantly reinforces Scottish Government's key policy areas, including the economy, transport, health, and plays a vital role in strengthening and sustaining rural and urban communities. In addition to this, other sectors in the Scottish economy such as retail, agriculture and construction, benefit either directly or indirectly from the tourism and events industries.



06

WORKING IN THE WIDER CONTEXT



WORKING IN THE WIDER CONTEXT



Direct Policy Impact

VisitScotland provides a strong direct contribution to the United Nations Sustainable Development Goals (UNSDG), Scotland's National Performance Framework (NPF) and National Strategy for Economic Transformation (NSET).

VisitScotland activities and associated investment in Scotland's tourism sector, significantly reinforce key areas of policy and have a vital role in achieving Scotland's social, economic, and net zero objectives, as well as underpinning Scotland's transition to a thriving wellbeing economy over the next ten years.

VisitScotland's domestic and international marketing, wide-ranging event support, travel trade events and exhibitions, and promotion with intermediaries, promote Scotland to a global audience. These essential activities provide economic and social benefits that stimulate regional economies, preserve cultures and traditions, while also improving the image of Scotland to potential visitors, migrants, students and investors.

Indirect Policy Impact

It is accepted that various sectors and policy areas are competing for resource.

Scotland's tourism industry is an important sector beyond the initial associations with the visitor economy. Investment in tourism and events, with their unique characteristics, can help maximise investment in other policy areas and potentially reduce reliance on other services that are competing for funding.

With collaboration as one of our core values, we recognise its increasing importance across public, private and third sectors. Our work to grow the value of the visitor economy involves effective partnerships which contribute to the wellbeing economy.

More specifically, investment in tourism and events can contribute to several nationally important objectives and maximise investment in other key policy areas including transport; social health and wellbeing; rural affairs; labour market, economy, and inclusion; and children and young people.



07

STRATEGIC CHANGE PROGRAMME



STRATEGIC CHANGE PROGRAMME



We are committed to our ambition to be a world-class organisation which helps to create better places for people to live, work and visit.

Our new Strategic Framework has a clear core purpose – to drive the visitor economy, growing its value – and our focus over the next year is to consider and implement how we best deliver that, in the current climate.

In 2024, VisitScotland is commencing a change programme to ensure the organisation is set up for the future with the required skills and resources that we need to deliver on our core purpose. This means shaping our marketing, events and industry advice activities to deliver what is needed now and in the future - potentially making some changes to deliver these activities in new ways. The programme will ensure that the organisation is the right size and shape to deliver its core purpose, driving the visitor economy and growing its value.

Key priorities for VisitScotland include:

- A marketing and information strategy that will stimulate responsible demand to ensure we get the right balance of leisure and business visitors across Scotland and the calendar year, with higher yield to increase spend in local communities.
- Increasing awareness of Scotland in core and emerging markets working with strategic partners, travel intermediaries and transport partners to grow Scotland's share of outbound travel in a responsible way.
- Increased focus on working with sector and destination partners to realise the unique sector strengths of each place, supporting the development of quality destinations, sustainable and profitable businesses, and increasing the number of new quality bookable experiences.
- Supporting the events industry to attract and develop world class events that will create sustainable, inclusive and vibrant memorable experiences.
- Providing advice and support that will help tourism and event businesses to de-carbonise and embrace the principles of responsible tourism.
- Continuing to lead and support Scotland's Visitor Management Strategy and local authority infrastructure investment plans.
- Supporting the work of Regional Economic Partnerships, ensuring opportunities are leveraged for the visitor economy, contributing to the development and delivery of local tourism strategies.
- Providing industry and partners with timely market and visitor insight
- Collaborating with partners across the public, private and third sectors on strategy and policy development.

STRATEGIC CHANGE PROGRAMME



Our strategic change programme is being overseen by a programme board which is accountable to our Leadership Group and the Board.

Individual project teams have been established for each review area, with subject matter experts from across the organisation, who will inform and shape proposals for our strategies.

The strategic reviews will consider the following areas:

- **Events strategy** – explore the role that VisitScotland Events directorate plays in supporting the delivery of the refreshed National Events Strategy, Scotland the Perfect Stage.
- **Quality strategy and tourism business advice and support programme** – assess our approach to ensuring quality in tourism and develop a digital-first business advice and support programme to maximise our impact on industry.
- **Information strategy** – explore the potential of a digital-first approach in order to extend our reach and help drive growth in the value of the visitor economy.
- **Technical infrastructure** – evaluate our digital and IT assets and establish proposals for investment to support our digital-first approach for both visitors and industry.
- **Workforce planning** – review key functions aligned to the strategic framework and consider the impact on structures and job roles, including reskilling and redeployment.

While initial discovery work has been done in some of these areas, this programme will allow for further insight to be gathered, benefits analyses to be completed and proposals fully considered.

As we develop our plans, we will be engaging with key stakeholders and industry to help inform our strategic direction and any implementation plans for change.

Underpinning all of this is our commitment to putting our own people at the centre of our approach, listening to and informing staff throughout the process.

This work will ensure we make the biggest impact we can in helping deliver both the objectives of the National Strategy for Economic Transformation and the priorities of Scotland Outlook 2030.

Ultimately, it will help us to achieve the spend, spread, sustainability and satisfaction that will allow us to deliver our core purpose and grow the value of the visitor economy.



08

OUR PEOPLE PRIORITIES IN 2024/5



OUR PEOPLE PRIORITIES IN 2024/25



Workforce Planning

The formulation and partial implementation of a workforce plan ensures we have the right balance of people resources and skills to meet the needs of the business. We aim to employ a workforce that is the right size and shape, with the right skills and at the right cost, to deliver our priorities and commitments. The plan will, over time, be implemented using a range of resourcing and developmental tools. This process will encourage the continuing growth of staff via redeployment, internal recruitment and developmental opportunities.

Growing our Own

By investing in our people and their continuing professional development, creating learning frameworks, development programmes and delivering on our commitment to youth engagement, we will continue to nurture and develop our staff, thereby meeting the needs of the business and contributing to retention levels.

Developing our Leaders

We continue our commitment to develop leadership skills at all levels of the organisation, ensuring we have robust succession plans in place for key leadership roles and that our leaders are skilled to lead with confidence.

Engaging with our Workforce

Giving our employees a voice remains core to our people activities and values as an organisation. Via our established Staff Consultation Group (which includes voluntarily recognised union representation), we work with our people and engage with them collectively, and on an individual level, to ensure they have a voice that is heard and respected.

A Progressive, Responsible and Inclusive Employer

We continue to focus on developing a culture that is progressive, with a commitment to greater levels of diversity. We remain focused on offering flexible and sustainable working conditions and supporting employment opportunities spread across Scotland.

Investing in Technology

We will continue to invest in technologies that will support the delivery of our People Strategy. This will include the continued development and operation of Oracle Cloud HCM.

