



APPENDIX 1

VisitScotland Impact Measurement Framework



Spread

International profile

- **17** countries with VisitScotland investment in 2024
- **117 million** global reach through owned social media channels (2024)
- **10.3 million** global reach through visitscotland.com (2024)
- **700 million** reach across **2,600** pieces of earned (PR) activity

Stimulating demand

- **11%** of long haul (LH) and **17%** of short haul (SH) visitors influenced to visit Scotland instead of another destination (2023).
- **257** international buyers, from **23** countries, brought to VisitScotland Connect in 2024
- **153** new ‘travel trade ready’ Scottish businesses (2024)
- **3** new and extended air routes supported into Scotland (2023/24)

Scotland-wide

- **32%** of LH and **27%** of SH visitors influenced to visit more places than originally planned (2023)
- **104** new itineraries offered by tour operators extending seasonality or regionality (2024)
- **42%** of events supported through the international events programme took place outside of Edinburgh and Glasgow

Year-round

- **24%** of LH and **20%** of SH visitors influenced to visit outside of the summer season (2023)
- **33** events supported outside July/August



Spend

Return on investment

- **£11 generated for every £1** marketing investment
- **£56.7 million** NEI of consumer marketing (2023)
- **£65:£1** return on ad spend across Online Travel Agencies (OTA) campaigns (2024/25)
- **£32.4 million** NEI of events development programme (2023/24)

Long-term benefit

- **4** major events in the pipeline, with multi-million pound anticipated economic impact
- **£153 million** value of business event leads generated in 2023/24

Added value

- **24%** of long haul (LH) and **13%** of short haul (SH) visitors influenced to stay longer than planned (2023)
- **28%** LH and **14%** of SH visitors influenced to visit an attraction that otherwise they would not have (2023)
- **130** countries reached with over **14,000 hours** of 2023 UCI Cycling Worlds Championships broadcast coverage
- **£6.7 million** additional value (spend) from business event delegates extending stays (2023/24)



Sustainability

Operational

- **77%** reduction in organisation’s carbon emissions for scope 1, 2 and 3 between 2008 and 2023
- **100%** of VisitScotland properties have achieved Green Tourism Certification
- **42%** of staff who have completed Carbon Literacy Training

Greener travel

- **£250,000** extra Caledonian Sleeper ticket sales generated over winter/spring season through joint campaign (2024)
- **44%** uplift in sales of ScotRail’s Kids for a Quid tickets following VisitScotland’s joint campaign with ScotRail (2024)
- **>54,000** hours of Scottish Canals campaign video watched promoting sustainable travel (2023)

Local

- **75** Rural Tourism Infrastructure Fund (RTIF) projects secured and funded (2024)
- **31%** of residents agree that “working closely with my local authority and industry to develop tourism in my area” is a core role of VisitScotland
- **74%** of residents agree that “tourism helps sustain Scotland’s communities”
- **22%** less red or amber/red rated visitor management incidents reported across **56%** less regions (2024 vs 2023)

Industry

- **192** downloads of the VisitScotland Climate Action workbook
- **41** tourism establishments have achieved Green Key certification (2024)



Satisfaction

Consumer

- **71%** of visitors rated their experience 9 or 10 out of 10 for Scotland
- **91%** of residents respond positively or very positively to “on balance, how do you view tourism as an industry in Scotland?”
- **97%** positive sentiment across all earned press coverage

Industry

- **8,124** targeted business engagements in 2024
- **90%** of buyers on VisitScotland Connect familiarisation trips planned to feature the suppliers (2024)
- **26** partnership marketing opportunities realised in 2024
- **89%** uplift in bookings from Canada following VisitScotland and WestJet partner campaign in 2024/25

About the VisitScotland Impact Measurement Framework

The purpose of the VisitScotland Impact Measurement Framework is to monitor progress and measure impact against the commitments set out in VisitScotland’s three-year Corporate Plan (2025 – 2028) and our activity. Each indicator relates to at least one commitment, as detailed below, with many delivering across multiple strategic pillars. Note there are a wider set of metrics used by the organisation to report on operational and management information, including our Annual Report.

The measures and indicators will be kept under review and will be adjusted or added to if and when new data becomes available.

VisitScotland Strategic Priorities and Commitments 2025-2028		
Strategic Pillars		Commitments
	Place Development	Providing continued leadership to the national visitor management programme, including management of the Rural Tourism Infrastructure Fund, to deliver infrastructure investment and reduce reported incidents
		Agreeing event development priorities with each local authority to ensure we maximise public sector investment
		Leveraging major events to deliver on key policy objectives at a local and national level
		Harnessing public and private sector investment as a catalyst for collaboration to support further destination development
	Business and Experience Development	Bringing Scottish businesses together with 220 international buyers from 20 markets through our annual travel trade event, VisitScotland Connect
		Establishing a new business support programme of free-to-access resources, delivering minimum 7,000 engagements with Scottish businesses per annum
		Working with industry to support sustainability, including climate action plans, the development and promotion of new product and sustainable itineraries, and facilitating key partnerships
		Supporting internationalisation and exports, with a minimum of 300 additional Scottish businesses to be ‘travel trade ready’ per annum

VisitScotland Strategic Priorities and Commitments 2025-2028

Strategic Pillars		Commitments
	Market Development	Sustaining an active presence in key global markets and maintaining a minimum marketing return on investment of 11:1
		Achieving an annual target of 230 business event leads generated, with a combined value of over £130 million
		Working with Scottish Government to secure a pipeline of major events for Scotland
		Working in partnership to maintain Scotland’s global profile, maximising Brand Scotland across key global moments
	Organisation Development	Investing our resources into driving the visitor economy, growing its value to Scotland
		Implementing a new People and Culture Plan, Data Plan and Technical Infrastructure Plan, ensuring the right skills, environment and tools are in place to meet our ambitions
		Delivering a refreshed programme of insights and measurement framework
		Achieving net zero for scope 1 and 2 emissions by 2030 and net zero for all scope 3 carbon emissions by 2045

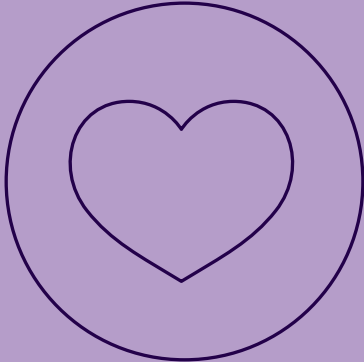
Indicator Measures & Sources

The following metrics and measures are subject to change based on a variety of data sources. Note there are some measures that are new or yet to be implemented (marked in grey), which will create a lag in reporting data and mean that the data presented at the beginning of this Appendix will not be complete at time of publication. We will seek to update our publication as new data becomes available. Reporting will otherwise be done on an annual basis.

Target Outcome	Indicator / Measure	Source	Strategic Pillar		
Spread 	Number of markets with VisitScotland investment (budget or resources)	Marketing programme outputs			●
	Global reach of VisitScotland’s organic social media channels	Platform analytics			●
	Global reach of visitscotland.com website, measured via site sessions	Platform analytics			●
	Global reach of earned (PR) activity	Press coverage analytics			●
	% of visitors influenced to visit Scotland instead of another destination	Marketing Effectiveness Study	●		●
	% of visitors influenced to visit more places than originally planned	Marketing Effectiveness Study	●		●
	% of visitors influenced to visit outside of the summer season	Marketing Effectiveness Study	●		●
	% of OTA bookings outside of the summer season <i>(campaign dependent)</i>	Platform analytics <i>(public data dependent)</i>			●
	Number of international buyers, and number of markets represented, confirmed for VisitScotland Connect per annum	Business development programme outputs		●	●
	Number of new itineraries offered by tour operators extending seasonality or regionality	Business development programme outputs	●	●	●
	New ‘travel trade ready’ Scottish businesses	Business development programme outputs		●	●
	New bookable sustainable tourism product	Business development programme outputs <i>(measurement to be assessed 2025)</i>		●	●
	New and extended routes supported into Scotland	Transport programme outputs			●
	Events supported by region	Events programme outputs	●		●

Target Outcome	Indicator / Measure	Source	Strategic Pillar			
Spend 	NEI of consumer marketing	Marketing Effectiveness Study				●
	Return on marketing investment	Marketing Effectiveness Study				● ●
	NEI of events supported	Event Organiser Outcome Reports	●	●		
	OTA booking revenue attributable to marketing campaigns (<i>campaign dependent</i>)	Platform analytics				●
	% of visitors influenced to stay longer than planned	Marketing Effectiveness Study	●			●
	% of visitors influenced to visit an attraction that otherwise they wouldn't have	Marketing Effectiveness Study	●	●		●
	Pipeline of major events, delivering significant economic impact	Events programme outputs	●	●		●
	Additional media value of major events	Event analytics	●			●
	Pipeline of business event leads generated and value	Business events programme outputs	●	●		●
	Additional value (spend) from business event delegates extending stays	Business events programme outputs	●	●		●

Target Outcome	Indicator / Measure	Source	Strategic Pillar		
Sustainability 	Reduction in organisation’s carbon emissions for scope 1, 2 and 3	Carbon monitor			●
	% of staff who have completed Carbon Literacy Training	VS Learning Academy report			●
	Number of Rural Tourism Infrastructure Fund (RTIF) projects secured and completed	RTIF programme outputs	●	●	
	% of residents who agree or strongly agree that “overall, tourism is good for the area”	Scottish Household Survey <i>(NB: new measure from 2025/26)</i>	●		
	% of residents who agree or strongly agree that “tourism is done in a way that does not harm the local area”	Scottish Household Survey <i>(NB: new measure from 2025/26)</i>	●		
	% of residents who agree that to “work closely with my local authority and industry to develop tourism in my area” is a core role of VisitScotland	Resident Survey <i>(Base: all aware of VisitScotland 947 - January 2025)</i>	●		
	% of residents who agree that “tourism helps sustain Scotland’s communities”	Resident Survey <i>(Base: all 1,032 - January 2025)</i>	●		
	Number of new eco and low-carbon itineraries offered by tour operators	Business development programme outputs	●	●	●
	Number of additional businesses joining Green Schemes	Business development programme outputs		●	
	Downloads of VisitScotland Climate Action Plan	Web analytics	●	●	
	Reduction in visitor management reported issues (red or amber/red rated)	Visitor Management Coordination Group RAG report	●		
	Reach and impact of partnership marketing activity with sustainable travel partners <i>(campaign dependent)</i>	Marketing analytics	●		●

Target Outcome	Indicator / Measure	Source	Strategic Pillar	
Satisfaction 	% of visitors rating their experience 9 or 10 out of 10 for Scotland	Visitor Survey <i>(Base: all 3,011 March – October 2023)</i>	●	
	X out of 5 average rating for listings (all) from visitors for Scotland	<i>(TBC: data source to be secured)</i>	●	●
	Number of targeted business engagements	Business development programme outputs		●
	Conversion rate for buyers on VisitScotland Connect familiarisation trips who planned to feature places/suppliers in future Scotland itineraries	VisitScotland Connect Event Report	●	●
	Ratio of positive (versus neutral or negative) experiences through business support engagements	Business satisfaction survey <i>(NB: new measure to be implemented)</i>		●
	Number of partnership opportunities realised	Marketing and sector programme outputs	●	●
	% of residents who respond positively or very positively to “on balance, how do you view tourism as an industry in Scotland?”	Resident Survey <i>(Base: all 1032 January 2025)</i>	●	
	Ratio of positive (versus negative) sentiment across all earned press coverage	Press monitoring and evaluation platform	●	
	A ‘good’ Net Promoter Score across social media channels (ranging from between 0 - 30)	Social listening platform	●	