

DRIVING THE VISITOR ECONOMY

VisitScotland's Corporate Plan 2025 - 2028

CONTENTS

FOREWORD	3
EXECUTIVE SUMMARY	6
THE VISITOR ECONOMY	8
Scotland's Performance	9
The Opportunity	11
The Challenges	13
OUR ROLE AND AMBITION	15
Where we are	16
Where we are going	18
How we will get there	19
Place Development	20
Business and Experience Development	22
Market Development	24
Organisation Development	26
Enhancing our capability	
Enabling our workforce	
MEASURING PROGRESS	28
Measurement Framework	29
Outcomes	30
WORKING TOGETHER TO DRIVE SCOTLAND'S ECONOMY	31



FOREWORD

01

[Contents](#)

[Foreword](#)

[Executive summary](#)

[The visitor economy](#)

[Our role and ambition](#)

[Measuring progress](#)

[Working together to drive
Scotland's economy](#)

**Our purpose at VisitScotland is clear –
to drive the visitor economy, growing its value to Scotland.**

We are recognised as a global leader in our marketing of Scotland as a destination and for our role in the delivery of a world-class programme of cultural, sporting and business events.

Scottish tourism has prospered for over 200 years, despite world wars, depressions and growing competition, showing remarkable resilience compared to other industries. In early 2020, tourism reached the industry's growth target set out in 2010, almost a year ahead of schedule. Through the Covid-19 pandemic, VisitScotland pivoted to ensure the successful delivery of more than £115 million in funds safeguarding approximately 8,000 jobs and supporting business resilience, whilst retaining in-market marketing presence to aid recovery following this most challenging period. Post-pandemic, international visitors have returned at a scale which has seen Scotland outperforming the rest of the UK. And, in 2020, VisitScotland established a subsidiary organisation to ensure the successful delivery of the world-first 2023 UCI Cycling World Championships, attracting over one million attendees and showcasing Scotland's beauty to a further 1.5 billion people around the globe through press coverage.

This demonstrates just some of our unique capability and how vital our work is in ensuring Scotland remains globally competitive in an ever-changing economic and technological landscape.



In this Corporate Plan, we chart our course for the next three years. We will build on our achievements to date, enhance our organisational capability, expand our support for the industry, enable greater connectivity and internationalisation, grow Scotland's share of global travel in key markets, reinvigorate domestic travel demand, and ultimately, work towards our vision to create better places for people to live, work and visit. Our plan sets out our ambitions and details our means of achieving them, while acknowledging the challenges and opportunities ahead.

Our track record is strong. We have already made bold decisions to adapt to the ever-changing world around us. This plan marks the next stage of our evolution.

With the right investment in place, we can realise our vision to create one of the most economically, environmentally and socially sustainable destinations in the world.

The visitor economy is a foundation of Scotland's economy, shaping our nation for generations past, present and future. The reach and impact of tourism and events is significant. In 2023, visitor spend was worth £10.8 billion to Scotland's economy, it sustained 245,000 jobs and supported 16,045 businesses, with growth recorded in each of these areas in the past 12 months. In fact, tourism-related industries are now the single biggest source of employment in Scotland, overtaking business and financial services for the first time.

Further to this, the events industry generates £61.653 billion annually for the economy (UK Event Report 2024), and it is estimated £5.5 billion (9%) of this can be attributed to Scotland.

Behind these headline figures lies an even greater ripple effect. The visitor economy benefits communities across the country, stimulating investment, influencing inward migration and workforce numbers, nurturing core employment and entrepreneurial skills, and boosting our health and wellbeing.

A thriving tourism and events industry drives the wellbeing economy ambitions set out in the Scottish Government's National Strategy for Economic Transformation.

However, there are undoubtedly challenges facing our industry. The current financial landscape means many businesses are finding it difficult to make a profit and therefore re-invest in operations.

Recruitment, coupled with a lack of adequate housing for employees, is a frequent barrier to sustaining employment. Regulatory changes also present additional costs and processes for businesses to consider.

At VisitScotland, we are steadfast in our support of tourism and events and are focused on the key areas where we can make the biggest impact.



Stephen Leckie,
Chair



Vicki Miller,
Chief Executive

EXECUTIVE SUMMARY

02

VisitScotland exists to drive the visitor economy and grow its value to Scotland. Our Corporate Plan sets out our priorities over the coming three years and how, with sustained and appropriate investment, we intend to deliver them.

 <h3>Place Development</h3>	 <h3>Business and Experience Development</h3>	 <h3>Market Development</h3>	 <h3>Organisation Development</h3>
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Bringing Scottish businesses together with 220 international buyers from 20 markets through our annual travel trade event • 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 	<ul style="list-style-type: none"> • 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 moment 	<ul style="list-style-type: none"> • 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



THE VISITOR ECONOMY

03

Contents

Foreword

Executive summary

The visitor economy

Our role and ambition

Measuring progress

Working together to drive
Scotland's economy

Scotland's Performance

£10.8 BILLION

visitor spend (2023)

+3% VALUE

all visitor spend (2023 vs 2022)

-2% VOLUME

all visits (2023 vs 2022)

#1

largest employment sector

245,000 JOBS (2024)

16,045 BUSINESSES (2024)

HOME OF GOLF

£1.36 BILLION

economic return from The Open (2005 – 2024)

11-YEAR partnership agreed with The R&A

14 championships (2024 - 2034)

Source: Scottish Government Growth Sector Statistics 2024

Spending by overseas and domestic visitors accounts for approximately 6% of the value of Scotland’s entire economy. This significant level of spending benefits the economy by providing demand for employment and opportunities for business development. Latest figures show that tourism alone was the single biggest employment sector, supporting 245,000 jobs (9.2% of all employment in Scotland) and 16,045 tourism-related businesses (9.2% of all businesses), which equates to one in 11 of all jobs and businesses in Scotland.

Importantly, the money spent by visitors also provides a significant stimulus to tourism and leisure-related industries and a wide variety of local supply chains throughout Scotland, such as food and drink, arts and culture, retail, construction, and transport. This in turn creates additional jobs, sustains communities, attracts investment and makes Scotland a better place to live, visit, work, study and do business.

Events are an important animator of a destination’s attractiveness, as well as generating jobs and income for local communities and businesses. Golf tourism is a well-established sector in Scotland’s visitor economy. Since 2005, The Open has been staged 10 times in Scotland generating £1.36 billion economic benefit, attracting more than two million fans and being broadcast to many millions more around the world. In 2024, VisitScotland signed a new partnership agreement with The R&A and Scottish Government, committing to investing a combined £11 million towards staging The Open, AIG Women’s Open and the Senior Open in Scotland between 2024 and 2034.

2023 was an exceptionally strong year for international visits to Scotland, resulting in a 23% increase in overnight visits and, critically, a 14% increase in spend. Scotland’s international tourism recovery outpaced our neighbours, as the only GB nation to recover to pre-pandemic levels. The US remained Scotland’s most valuable international market, followed by Germany and France. The removal of travel restrictions in China has also seen an increase in visitors from this market, with recovery expected to strengthen in the coming years.

But domestic tourism has been more challenging, with slower recovery post Covid-19. Our research shows this is a direct result of the cost of living, which has proven a major barrier to domestic travel.

The softer domestic market, combined with stronger international performance, means that for the first time spending by overseas visitors accounted for more than half of the total overnight visitor spend. Scotland saw a 2% decrease in cumulative volume (all visitor day trip and overnight visits) but a 3% increase in value (all visitor spend) in 2023 compared to 2022.

Early data for 2024 showed no significant sign of improvement for the domestic market. Domestic holidaymakers, particularly families and young independent travellers, continued to opt for shorter trips or cut back spending on leisure, experiences and activities. However, our consumer sentiment tracker showed intentions to travel to Scotland had increased slightly on 2023 and, encouragingly, booking levels in spring 2025 were stronger than the same period in 2024.

Sources: GBDVS, GBTS, IPS, VisitScotland EMR 2024, Scottish Government Industry Statistics 2025, R&A Report by Sheffield Hallam University’s Sport Industry Research Centre

The Opportunity

‘Sustainable tourism’ is recognised as a key Scottish Government growth sector; a sector in which Scotland has a distinct competitive advantage.

Recent growth projections show new tourism-related jobs will grow at nearly double the national growth rate up to 2027, at which time tourism employment will account for **one in 8.2 new jobs in Scotland**. These new employment opportunities are inclusive, spread around the country, and available to people of all ages, skills and socio-economic backgrounds. They also provide key foundational skills that support further career development and entrepreneurial success.

1.6 X RATE OF GROWTH

for tourism-related jobs versus national rate

Visitor income from other countries is an export and a valuable source of additional national revenue. However, the value and importance of Scotland’s visitor economy extends well beyond providing income opportunities. The multi-faceted nature of tourism and events helps deliver a broad range of wider economic, social, health and wellbeing outcomes that are spread across Scotland’s urban, rural and island communities.

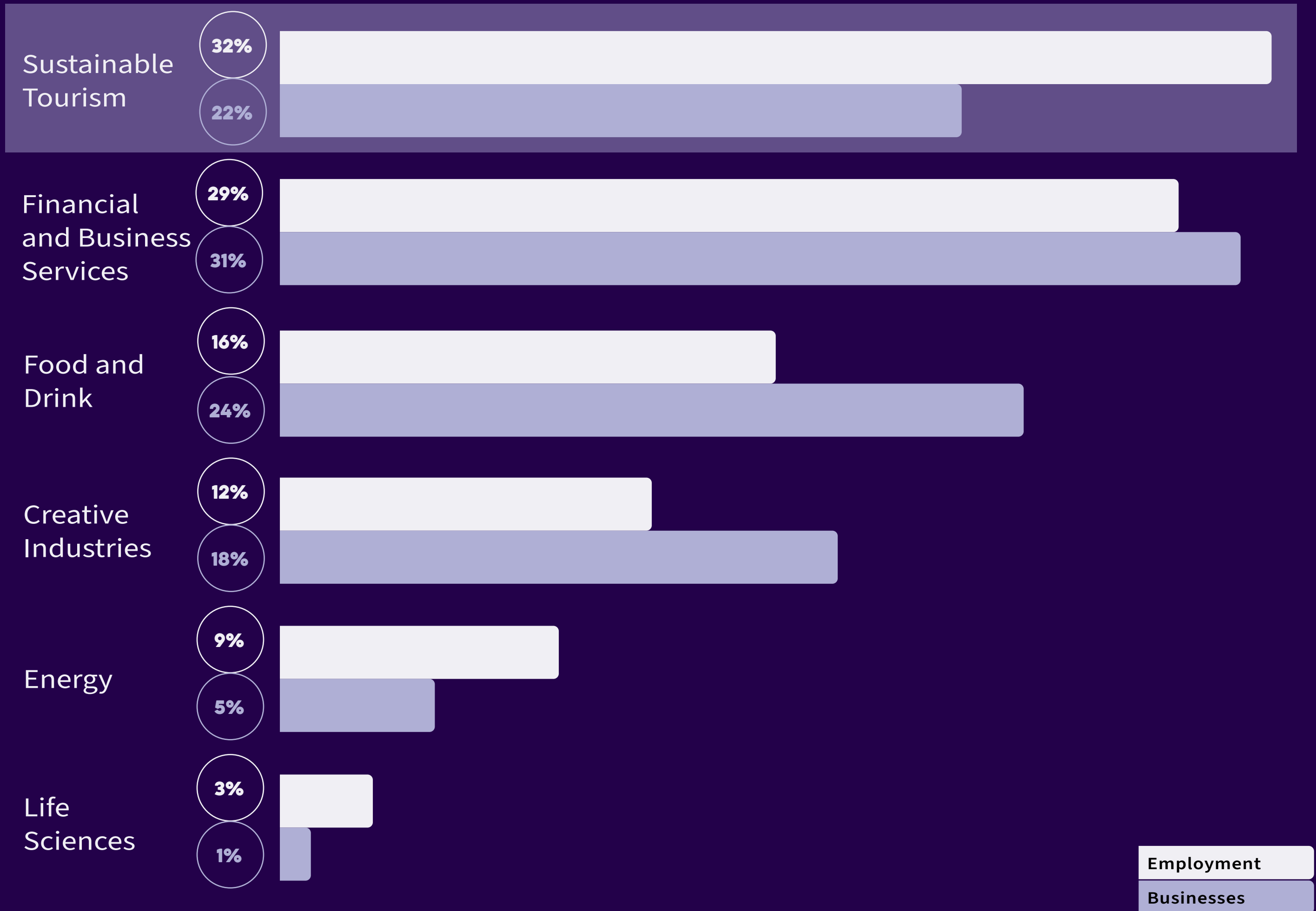
A well-managed portfolio of tourism and events also promotes Scotland to a global audience, enables cultural and knowledge exchange, builds a strong sense of place, creates attractive business environments, promotes trade and investment opportunities, and provides support for local facilities, services and infrastructure. A strong tourism offering enhances physical, mental and emotional wellbeing and events help build a sense of pride and confidence, boosting community wellbeing and bringing lasting social and cultural impacts. Together, this supports our work to build Scotland’s profile as a desirable place to visit, live, work, study, and do business. A strong, well-functioning tourism and events sector directly and indirectly contributes to Scotland’s wellbeing economy objective and a vast range of other national priorities.

Source: Sectoral Skills Assessments (SSAs) – Tourism, Skills Development Scotland October 2024





Sector percentage of total employment and businesses in 2024



Source: Sectoral Skills Assessments (SSAs) - Tourism, Skills Development Scotland October 2024

The Challenges

Scotland is uniquely positioned to thrive in the experience economy by leveraging its natural landscapes and rich cultural heritage to create experiences which promote responsible practices and meaningful change while building deeper connections to people and places. By doing this, Scotland can strengthen its global reputation as a destination that enriches lives, fosters sustainability, and supports vibrant communities.

However, tourism, hospitality and events businesses are operating in some of the most challenging economic and geo-political times they have ever known. The role of VisitScotland in providing industry leadership, guidance and insight, stimulating and managing demand and encouraging a more equitable distribution of visitor spend has arguably never been greater. While we recognise the scale of these challenges, it is also critical that we understand the opportunities that they present, ensuring that we are agile enough to adapt and respond effectively.



Cost of living pressures

Economic uncertainty and the cost of living crisis has impacted consumer finance and confidence, affecting both tourism and events, particularly within the domestic market. This is coupled with the resurgence and high demand for overseas holidays, with consumers increasingly seeking value for money and last-minute deals. How we position Scotland to the domestic market is critical to building back demand and will require a focus on ensuring that the right kind of product and experiences are bookable and discoverable by the right audiences.



A challenging operating environment for businesses in tourism and events

A complex and evolving operating environment continues to present fresh challenges to tourism and events businesses. Industry is having to respond to the cost of doing business, changing funding landscape, supply chains, workforce issues, changes to legislation and the regulatory environment. Increasingly, VisitScotland must provide leadership, guidance and support to navigate this changing landscape and to unlock key opportunities.



Facing into the climate emergency

Tackling climate change is one of the biggest challenges facing the tourism and events sector. Tourism contributes to climate change but also stands to suffer its consequences. Our natural and cultural assets, the things that make Scotland so special, are at risk from the impacts of climate change. It is more important than ever to ensure that tourism and events are part of the solution in tackling the climate emergency and achieving our net zero ambitions. Taking steps towards Scotland's net zero ambitions will protect our natural and cultural heritage for future generations.



Competitive travel landscape and changing traveller behaviour

The travel and events marketplace has never been more crowded. New destinations are opening to visitors while established destinations are operating with significantly higher budgets. Competition from other UK and international event and festival destinations grows stronger, potentially threatening Scotland's world-leading reputation as a host destination. This competition means we must work harder to ensure Scotland is top of mind for travellers. Globally the appetite for travel and events remains strong, and consumers are showing an increasing desire for authentic travel experiences including access to the outdoors, unique culture, and local food and drink experiences. Here, Scotland can build on strong competitive advantage with an array of powerfully enriching experiences that showcase and utilise our iconic natural environment, signature events, built facilities, cultural identity and heritage, our academic and sectoral credentials, and our people.



Constantly evolving digital environment

Consumers are increasingly turning to digital sources for their inspiration, research and planning. Video content, social media and influencer channels have become leading information sources offering relatable, curated travel and experience ideas. There is a notable rise in pre-booking ahead of travel, not only for accommodation but also for activities and experiences. As the customer journey progresses, Artificial Intelligence (AI)-powered trip planning from Online Travel Agencies (OTAs) and others is simplifying the planning-to-booking process. In a constantly evolving digital environment, it is more crucial than ever that we create a strong online presence across multiple touch points, enabling a seamless end-to-end planning and booking experience.



OUR ROLE AND AMBITION

04

Where we are

As the national agency for tourism and events, VisitScotland works to benefit Scotland by driving growth in value of the visitor economy.

Originally the Scottish Tourist Board, it was established over 55 years ago with a remit to promote the development of tourism.

Since then, the landscape has changed fundamentally, and we have continuously evolved to maximise our impact and respond to the changes in visitor behaviour and business needs.

Our expertise in sales and marketing has been central to enhancing Scotland's global reputation as a must-visit destination for decades, however as the landscape has become increasingly competitive, we have continued to evolve to meet these challenges. We have spent the past 18 months undergoing a comprehensive Strategic Change Programme, designed to shape the organisation for the future.

As a key partner in Team Scotland, our focus is on the interwoven functions that stimulate and manage responsible demand, ensure a world-class portfolio of events, grow local visitor economies, and help develop profitable businesses and internationalisation opportunities.

We continue to adapt, using insight along with our skills and expertise to identify and implement the strategies that will grow the value of the visitor economy.

The delivery of the UCI Cycling World Championships in 2023 is just one example of the organisation's specialist capability, adapting to deliver a first-of-its kind international event achieving £344 million of incremental spend, resulting in £205 million Gross Value Added (GVA) economic impact for Scotland, £129 million GVA for Glasgow and £214 million GVA for the UK. There was also £220 million total visitor spend in Scotland during this time, and our contribution to total full-time equivalent employment supported by the event included 5,878 jobs in the UK (including 5,285 jobs in Scotland and 3,312 jobs in Glasgow).

We measure success through our 4S outcomes – influencing spread, spend, sustainability and satisfaction for our staff, industry, visitors and communities across Scotland – and our Economic Measurement Framework (EMF).

We have already made bold decisions to focus our expertise and resources on the areas we know we can make the greatest impact. This includes evolving our business support model to reach more business and sharing our knowledge, both online and in person, to help business grow and reach new audiences and markets. Similarly, our approach to information means we are focused on reaching visitors at that pre-arrival stage of their journey, inspiring and influencing them to plan and book their trips before they travel. By doing this we can influence where, when and how long they visit.

These changes to the way we work are crucial if we are to maximise the impact we make with the funding and resources that we have.

This plan sets out our clear intention to continue that evolution, further supporting the ambitions of public service reform and delivering our core purpose.



Stimulating and managing international demand

£11 for every £1

generated for the economy by VisitScotland marketing investment (2023/24)

17

countries with VisitScotland activity and/or investment

117M

global social reach via organic social channels in 2024

10.3M

global website reach VisitScotland.com site sessions in 2024

£22.4M NEI

from Route Development activity (2023/24)

£6.7M

value from business event delegates extending stays

Working collaboratively with community, destination, and sector organisations

£600M

invested across 30 Growth Project Deals (2023/24)

£344M NEI

from UCI Cycling World Championships event (2023/24)

#1 in UK

Edinburgh top location in the UK for hotel investment (2024)

75

Rural Tourism Infrastructure (RTIF) projects funded (2024)

63,674

place brand assets multimedia for use in VisitScotland Toolkit 2024

Supporting tourism and events businesses

£32.4M NEI

from Event Development Programmes (2023/24)

153

additional travel trade ready businesses supported by VisitScotland in 2024

130

new and extended travel itineraries addressing regional and seasonal spread taken to market in 2024, influenced by VisitScotland

8,124

face-to-face meetings for Scottish businesses with international buyers and intermediaries facilitated in 2024

NEI: Net Economic Impact

Where we are going

Our role has evolved as the world around us has changed. Our future focus remains on economic growth, using our people, data and insight to evolve our approach and ensure we are reaching the right audiences with the right messages, offering the right support to businesses and destinations, and prioritising the markets that are core to driving sustainable growth now and in the future.

By focusing our resources and harnessing our skills and expertise around our revised strategic priorities, we can attract investment into Scotland, help businesses to grow, and leverage tourism and events as a force for good for all of Scotland's people and places. This ultimately builds Scotland's international profile as a leading place to visit, live, work, study and do business.

However, this is not something we can do in isolation, and we will continue to develop innovative partnerships with like-minded private and public organisations who put responsible tourism and climate action at their centre. Our partnership work is designed to ensure we are as efficient as possible, amplifying the impact and reach of our own budgets and enabling us to target new audiences, influence more responsible travel behaviours, and maximise the value of every visit.

Our new Strategic Framework sets out how we will deliver value for the visitor economy, informed by the industry strategies for tourism and events – Scotland Outlook 2030 and Scotland the Perfect Stage 2024-2035 – with our people, our places, our businesses, our experiences and our environment at its core.

VisitScotland's activities directly support the interwoven ambitions and outcomes of the United Nations Sustainable Development Goals (UNSDG), Scottish Government's National Performance Framework (NPF) and Scottish Government's National Strategy for Economic Transformation (NSET).

Our Corporate Plan is a commitment to build on our achievements to date, continue to demonstrate innovation and ensure that the benefits of a thriving visitor economy are felt by all.



How we will get there



Place Development

Support regional economic strategies and develop our destinations by leveraging the opportunities of public and private sector investment across tourism and events.



Business and Experience Development

Deliver sector-specific advice and support including helping tourism and events businesses to develop new products and visitor experiences, reaching new audiences and markets.



Market Development

Attract inbound leisure, association conferences, business and corporate travel, and major events, through a mix of strategic marketing, intermediary, partner and media relations activities.



Organisation Development

Enhance our organisation insight, capability, planning and compliance, set up with the right roles, skills, technology and data to maximise opportunity.





Place Development

If we are to deliver our core purpose of driving the visitor economy and growing its value to Scotland, then one thing is clear, we cannot do it on our own.

A founding partner of the Brand Scotland partnership, we are committed to strengthening Scotland's global identity and reputation through aligning our collective resources, reinforcing Scotland as a top choice to visit, live, work, study, and do business. Research (Bloom Consulting, 2024) on "place branding" shows a strong link between how people view a place and its economic success. Key findings reveal that perception influences 24% of tourism income for countries and 23% for cities. It also affects 24% of foreign investment for countries and 37% for cities. Using these findings, VisitScotland's promotional efforts, combined with those of Brand Scotland, are estimated to have contributed £1.2 billion to tourism income in 2023 alone.

£1.2 BILLION
estimated value of
tourism receipts 2023*

We will work with industry, destination and sector organisations and other public and private partners to shape local visitor economies, maximising their benefits in line with the unique needs and opportunities of each destination. This will ensure we deliver for communities in every part of Scotland, supporting livelihoods and sustaining local services.

Our commitment to collaboration reaches across the organisation, its importance signalled by its presence as one of our core values.

At a national level we will continue to support the work of the Tourism and Hospitality Industry Leadership Group and the Event Industry Advisory Group to ensure our collective efforts are delivering on the ambitions set out in the industry strategies – Scotland Outlook 2030 and Scotland the Perfect Stage 2024-2035.

Through our work with industry and community partners, we seek to distribute the economic and social benefits of tourism and events across Scotland. This means ensuring that the experiences and welcome offered by industry and communities in destinations are combined with the appropriate investment cases and infrastructure to address issues of quality, sustainability, inclusivity, capacity and, ultimately, deliver against Scotland's target of net zero by 2045.

Our focus on place will see close working with destination and regional stakeholders, including Regional Economic Partnerships and

local authorities. Through insights, strategy development and delivery, we will work with partners to define the needs and opportunities for regional visitor economies and their role in supporting wider economic development in line with National Strategy for Economic Transformation (NSET). We will contribute to the development and delivery of the visitor levy where it is introduced by local authorities, ensuring consideration is given to the impact upon visitor demand and businesses, and that investment proposals will benefit the local visitor economy. And we will continue to work collaboratively across other key policy areas such as new National Parks, visitor management, and support for Scotland's towns and cities, rural and island communities.

Scotland's distinct, varied and vibrant offering is what attracts visitors from across the world. It is why place development goes hand in hand with our market development activity. We need to make sure that all areas of the country feel the benefits of tourism and events, and that communities feel comfortable and capable of welcoming visitors.

We recognise there is a careful balance to strike and in our role as Chair of the national working group on visitor management, we led the creation of the strategic framework for visitor management. With increasing pressures facing some destinations we will be revising this framework so we can continue providing a strategic and coordinated approach on key issues, working with destinations to share insight, manage visitor demand, promote responsible behaviour and identify opportunities for additional infrastructure which will alleviate pressure on honeypot areas.

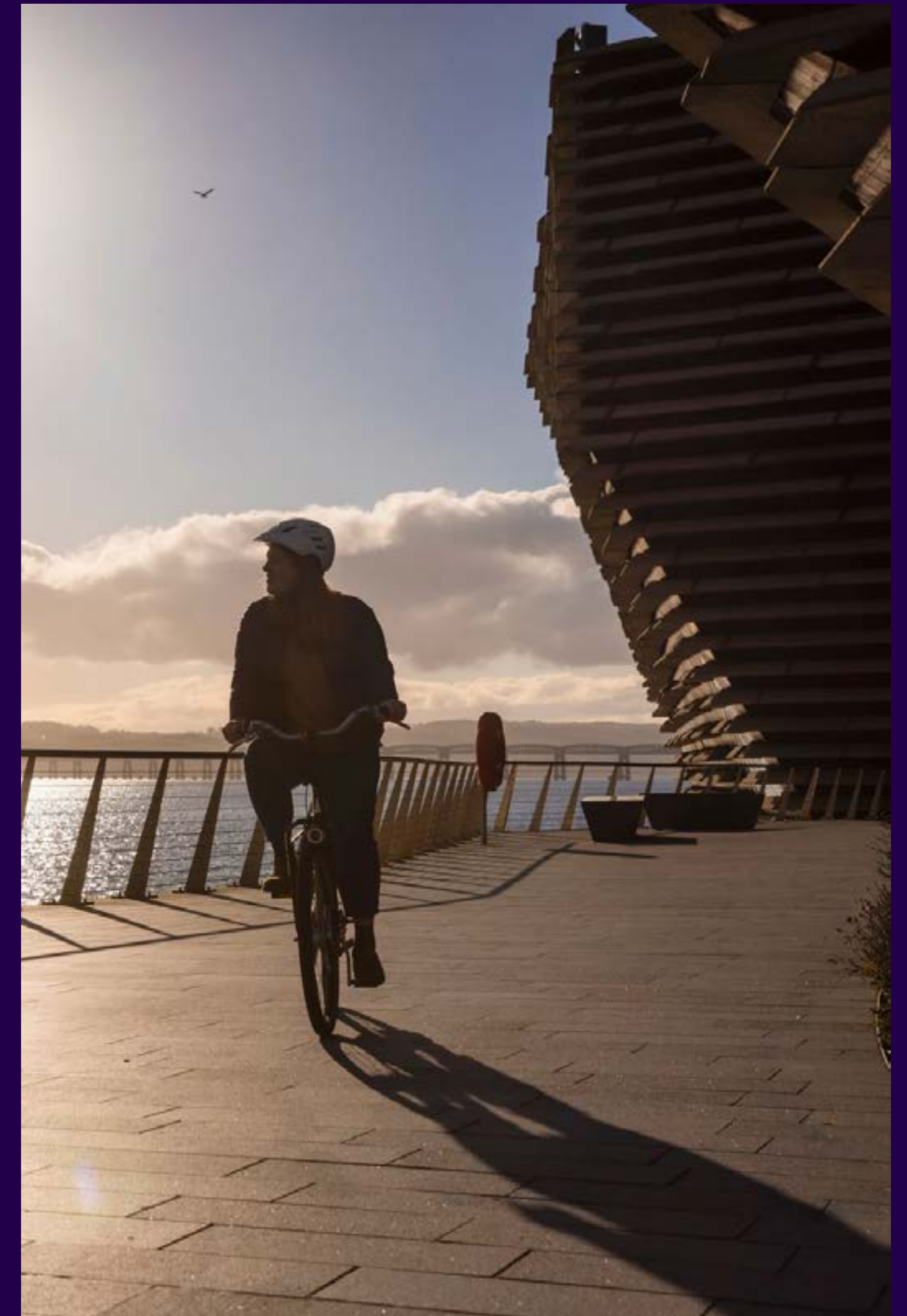
Since 2018, VisitScotland has administered the Rural Tourism Infrastructure Fund (RTIF) on behalf of the Scottish Government. The fund has improved the visitor experience in rural parts of Scotland, helping address pressure on local infrastructure or any negative impacts on communities by providing additional facilities such as toilets, parking and motorhome facilities. An additional £15 million investment has been leveraged through RTIF since its inception. With ongoing investment, we will continue to deliver the Rural Tourism Infrastructure Fund in close collaboration with local partners to identify and complete strategic projects that further improve infrastructure, enhance visitor satisfaction and encourage increased visitor spend into our rural communities.

Working with local authorities, we will agree their event development priorities so that through our work we can further their aims and ambitions to develop key nationally and internationally significant events that enhance their destination experience and contribute to ongoing economic growth.

Place brand expertise and partnership marketing will enable us to maximise our collective impact, raising awareness and driving demand for our regional and sectoral offerings. We will bring our expertise and knowledge to add value to strategic tourism and event investments by private or public sector, strengthening the visitor economy at a regional level. Working with destinations and communities, we will advise, support and promote visitor and event experiences which deliver regional and seasonal spread and where there is capacity. Our work will support the delivery of a world-class, diverse, and inclusive portfolio of cultural, sporting and business events, across the country, raising Scotland's profile as a world-leading events destination and ensuring the economic and societal benefits of attracting and hosting events are felt more widely.

VisitScotland will continue to develop innovative partnerships with like-minded organisations who put responsible tourism and climate action at their centre. This includes the development of low-carbon products that will help to deliver progress towards Scotland's net zero ambitions. Our partnership work is designed to ensure we are as efficient as possible, amplifying the impact and reach of our own budgets and enabling us to reach new audiences, influence more responsible travel behaviours and maximise the value of every visit.

*Source: Bloom Consulting 'The Impact of Nation and Place Brands' 2024





Business and Experience Development

As one of six Scottish Government growth sectors, tourism accounts for a high share of total growth sector employment (30%) and businesses (22%). Since 2016, tourism employment growth has outperformed the growth sector average (+11% compared to +7%), while the number of tourism businesses has also grown, compared to a contraction at overall growth sector level (+12% compared to - 8%). Tourism-related industries are now the single biggest employer in Scotland, exceeding financial and business services in 2023 for the first time.

At the heart of a thriving, dynamic visitor economy are businesses delivering experiences which adapt and evolve to satisfy the changing demands of the future traveller. Success depends on an evolving portfolio of product and events, which simultaneously delivers benefits to communities across Scotland and underpins the destination's credentials among the global travel and events community. Our activity is helping businesses to tap into changing travel trends, capitalise on local investment projects and sector strengths and adapt their offer to reach new audiences and markets with the experience we know visitors want.

Over the next three years, we will expand our work supporting tourism and events businesses to identify and harness the opportunities presented by UK and international tourism growth, while also helping them negotiate the challenges of working towards net zero. Targeting sustainable business growth, we will work in partnership to deliver on the aspirations and objectives of the industry strategies – Scotland Outlook 2030 and Scotland the Perfect Stage 2024-2035.

We will continue to help businesses to create more of the right products and experiences and connect them with the right partners and platforms to take them into market. We will focus on those products and places with capacity for growth – presenting opportunities to spread visits across regions and seasons, encouraging longer stays and higher spend, and generating positive engagement and jobs in rural, island and urban communities.

We will deliver a year-round programme of free-to-access support for tourism and event businesses, with a focus on:

- sharing actionable industry and market insight
- driving up the quality of the visitor/event experience
- increasing the pipeline of distribution-ready products and experiences
- supporting our dynamic, resilient and world-leading events sector
- developing a world-class, diverse and inclusive portfolio of cultural, sport and business events
- increasing the discoverability and bookability of tourism and event businesses
- driving adoption of inclusive and climate action planning
- helping businesses navigate tourism and events industry policy, regulations and compliance

We will deliver business support by sharing our knowledge both online and in person to help businesses grow, reach new audiences and markets.

Underpinning all of this work is our new self-serve digital business support hub which will extend our reach, supporting tourism and events businesses of all sizes and locations right across Scotland, to grow and deliver quality, memorable experiences.

Targeting specific product and place-based opportunities, we will work directly with partner agencies including local authorities, destination management organisations and sector groups. Bringing the expertise of teams from across the organisation, we will provide tailored support and advice, programmes of webinars, workshops, on and offline distribution and marketing opportunities to build clusters, connections, capacity and competence. This will ultimately help to drive growth in key locations with capacity and in target sectors nationwide, including outdoor and adventure holidays, agritourism and immersive experiences, food and drink, luxury experiences, cultural, sport and business events.

Our in-person support will include our flagship travel trade event, VisitScotland Connect, which is a valuable opportunity for showcasing and contracting new product into market via travel intermediaries, such as tour operators and travel advisors. We will also continue to highlight best practice and celebrate success through the Scottish Thistle Awards programme and partnership.

As a partner in the multi-agency Business Support Partnership, we will continue to support the collective aims of that work, ensuring signposting to appropriate support that VisitScotland does not provide. This will ensure there is no duplication in service provision, thereby supporting the aims of public service reform and benefiting businesses by providing sector-specific, tailored advice where it is most relevant.





Market Development

Using data and insight and an integrated marketing strategy, we are working with like-minded public and private partners to build Scotland's reputation as must visit, must return destination across target markets and audiences. This not only attracts visitors but, by extension, encourages people to live, work, study and do business here.

With the devastating impacts of climate change increasingly evident, it is more important than ever for us to realise the ambitions of responsible tourism and lead by example. This means creating and managing demand in a sustainable way.

Our insight shows that visitors are looking for deeper connections and personalised experiences when they travel; this includes exploring nature and the outdoors, enjoying local culture and sampling local food and drink. Here, Scotland holds a strong competitive advantage and the opportunity to shape more responsible travel choices.

Domestically, we have seen lower forward booking levels and consumer confidence. Through our work with industry to make tourism products easy to find and book, there is also the opportunity to promote more affordable transport and accommodation options, value-add itineraries, and 'luxury for less' personalised experiences. By inspiring those who are less sensitive to cost pressures – multi-generational group travel, adventure and tailored immersive travel seekers – we will continue to build back domestic demand and bookings.

To achieve our ambitions over the coming three years, our focus will be on promoting and protecting our natural assets and heritage. Working with industry we will further strengthen our visitor offering through education, tourism product development and better market access. Our new visitor proposition, surmised as 'good for the soul', speaks to the mutual benefit that a visit to Scotland can have upon our visitors' wellbeing and upon the place itself. This will be brought to life and kept visible across our always-on global consumer and business-facing marketing activity.

We know we best influence the behaviours and travel choices of visitors by reaching them early, often at the beginning of their planning. We use a range of tactics including social media, digital marketing and media relations, both directly to visitors and through key intermediaries and partners, to keep Scotland front of mind in an increasingly competitive global marketplace. Using insight into how consumers search and use information when planning and booking travel, we create and curate engaging and inspiring content which brings to life the people and places behind Scotland's world-renowned offering.

In response to user research demonstrating where we best influence travel choices, our consumer website visitscotland.com will be further developed to support the inspiration and planning phases of the visitor journey.





We will grow our content creation capability and a network of content creators and storytelling partners to extend our reach and influence. This content will inspire visits in quieter months and to places with capacity, extending the season and spreading visitors and their spend across our communities and regions. Throughout all our activity, we will encourage visitors to tread lightly and appreciate the impact of their visit on the places and people they encounter.

The US market will continue to drive headline international growth, while our UK and European markets, particularly Germany and France, are essential to help spread and disperse visitors across different regions and seasons. The continued return of our visitors from China will further boost our international performance. And there is the opportunity to tap into growing interest in ancestral and diaspora-related travel from Australia, Canada and Gulf Cooperation Council (GCC) countries. Travel intermediaries, including tour operators and travel advisors, are an essential resource for many of our international visitors, and we will work with the most influential to encourage them to develop new itineraries to all areas of Scotland, travelling all year round.

We will continue to work closely with VisitBritain to ensure accurate and strategically aligned positioning of Scotland within Great Britain global visitor marketing, including collaborating with their in-market teams to enhance our market intelligence, network and impact.

Supporting a Team Scotland approach, we will continue to work together on improving access into Scotland, building a strong route network across air, land and water which makes it easier for visitors to reach us. This includes collaborating with Scotland's airports to target strategic connectivity gaps, with a focus on key routes supporting

inbound travel, business connectivity and inward investment. We will also continue to champion sustainable transport, inclusive tourism and low-impact holidays, working with relevant sector and industry partners.

We will leverage major business, cultural and sporting events to strengthen and showcase the richness of our destination brand story and reinforce Scotland as the perfect stage for events. These include major events like the Commonwealth Games 2026 in Glasgow, The Open 2027 in St Andrews, Tour de France 2027, and EURO 2028, as well as our annual and recurring 'signature' events such as the Edinburgh Festivals, Glasgow's Celtic Connections and our wider portfolio of major golf events. All of these are part of our cultural and sporting identity, inextricably connected to both our sense of place and our reputation.

As a globally recognised business events destination, we will capitalise on travel trends around combining business with leisure travel and the growth of remote overseas working – "bleisure" and "flexcations". Targeted partnerships and marketing will seek to enhance the value of every business trip, encourage longer stays, and convert traditionally individual or work group travel into extended holidays with friends and family.

We will continue our policy-driven approach to business events, which has already secured a pipeline of opportunities, including the Ocean Sciences Meeting 2026 and World Agritourism Conference in 2026, and supports further visitor demand generation. This work targets business events that strengthen our sector and academic areas of excellence - particularly from high value markets like North America and Europe - spreading the positive societal and economic benefits beyond the additional visitors they attract.



Organisation Development

Enhancing our capability

We take a data-driven approach to everything we do, ensuring we have the right skills, technology, data sources and insight to deliver upon our objectives. As we respond to the evolving technological environment around us, we apply agile ways of working to ensure we can swiftly and effectively adapt and respond to deliver the greatest impact.

It is crucial we maintain a rich understanding of the key markets and traveller segments of visitors to Scotland, as well those who engage with our multiple touchpoints. This allows us to create and support relevant, compelling and effective activities. We must have a robust picture of tourism and event performance and prospects in Scotland, and a thorough understanding of responsible tourism indicators and issues to understand the impact we have and where the opportunities lie.

The creation of a new Strategy and Competitive Intelligence Directorate will play a critical role in delivering a comprehensive data and insight resource to support responsible tourism and event ambitions and strategies, empowering the industry and government to make data-driven decisions on strategy, policy and investment.

At a time when public service reform is a key part of the Scottish Government's agenda, we are already carrying out a comprehensive review of our technical infrastructure and business processes, as part of our Strategic Change Programme. Initially, this will focus on cost/benefit analysis of our current systems and platforms, but ultimately this work will

ensure we are enhancing our organisation's capability to deliver on our digital strategy and also identify areas where improvements can be made.

It is critical that we provide reliable and robust platforms to support our organisational objectives. This involves research, testing, timely updates, and platform enhancements across our digital estate. We will utilise user research, analytics and insights to inform and guide our delivery. Continuous performance monitoring and identifying opportunities for improvement are essential as well as leveraging the capabilities of our current platforms, exploring innovative cloud-based solutions to drive improvements, whilst working toward our sustainable goals.

As well as the ongoing focus on maintaining a robust and effective control environment with regards to general cyber security, we will ensure we continue to strengthen our controls as we seek opportunities to enhance the way we work through automation. Specifically, as we pursue the use of artificial intelligence (AI), we must ensure that we have identified all of the opportunities and threats that this presents and establish effective processes and procedures to minimise the risk to the organisation, while realising the benefits of the technology.

We will continue to bring best practice into our support activities, including prioritising areas such as fair work and net zero, and collaborate with other public bodies where appropriate. Our Board has strategic oversight of our annual planning and financial activity, ensuring we prioritise our resources to maximise our objectives and strategic outcomes.



Enabling our workforce

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

We will foster this through our refreshed People and Culture Plan, ensuring we remain an employer of choice in Scotland. We will continue to cultivate a positive, inclusive and progressive culture where our people can thrive and deliver the commitments outlined in our Strategic Framework. Providing our workforce with a work environment and the tools that facilitate innovation and collaboration, we embrace flexible and sustainable work practices.

The health and wellbeing of our workforce remains a priority, influencing the people services we deliver. We will focus on cultivating and developing a transparent and honest culture within the organisation to drive high levels of staff engagement, improving job satisfaction and maintaining low absence levels. Key to this is a visible leadership team, opportunities for two-way dialogue with staff, and a regular programme of communication and engagement using a variety of channels.

We have a clear commitment to learning and development and will continue to provide regular and ongoing opportunities to upskill our people through continuing professional development and career development goals.

The specialist skills required to realise our plan are changing. We will continue to identify and integrate the changing skillsets required

to become a fully rounded world-class organisation. By embracing, nurturing and developing specialists in key areas of the business, we create an organisation which possesses not only the skills required for future growth but also demonstrates an in-depth knowledge and passion for tourism and events. We will continue to develop and build our VS Learning Academy, giving access to staff to a range of bespoke learning solutions to support their personal and professional development.

We will provide the tools and technology that enable our people to work smarter and gather, interrogate, and interpret data and information which will lead to greater understanding and fulfilment of our visitor, partner and internal stakeholder needs. This also enables us as an organisation to draw upon data and trends to support our decision-making, shape our people services and build a workforce plan that ensures we have the right shape and size of organisation to meet our strategic commitments and be as efficient as possible.

We have made significant progress in reducing our estate across the country in line with our commitment to identify efficiencies and work with other public sector bodies to maximise on shared service opportunities. As of January 2025, we have nine co-located offices with other public sector bodies. This will continue but we must be mindful of providing our people with the spaces they need to work effectively and collaboratively in line with our hybrid working policy. We are committed to our ambition to be net zero in scope 1 and 2 by 2030 and in scope 3 by 2045 and will work each year to reduce our energy, travel, and waste. We will continue to review the scope of our sustainability accountability measures to ensure they are evolving and responding to external requirements. Progress will be reported in our internal annual sustainability report and public bodies climate change duties report.





MEASURING PROGRESS

05

Measurement Framework

A robust programme of measurement and evaluation is in place to assess progress and outcomes in relation to VisitScotland activity and our impact on the visitor economy. With the establishment of the new Strategy and Competitive Intelligence Directorate, this will be further developed to respond to opportunities across tourism and events, ensuring we maximise the value of our activity.

The ability to deliver on our ambition will be dependent on the resources available to VisitScotland each year.

VisitScotland's Economic Measurement Framework (EMF) was introduced in 2015 and has been continually updated to reflect the indicators and ambitions set out in Scotland's National Performance Framework (NPF), Scotland's National Strategy for Economic Transformation (NSET) and our national tourism strategy Scotland Outlook 2030 (SO2030).

VisitScotland's EMF is now made up of three distinct tiers of reporting:

1. Net Economic Impact (NEI) Assessments – Quantitative impact of VisitScotland activities
2. Strategic Value Added – Qualitative explanation of VisitScotland's strategic added value to NPF and NSET
3. [SO2030 Tracker](#) – Quantitative approach using primary and secondary datasets to assess progress against SO2030 strategy objectives

What do we measure?

We measure and evaluate net economic impact across all core activity:

- Place and business development: EventScotland programme of events - International, National and Golf programmes
- Business and experience development: Scotland Connect - impact of event on Scottish exhibitor business and short-term impact of on host city
- Business and experience development: National Bid Fund - Conferences supported
- Market development: Visitor marketing - International, Scotland, Rest of UK and Ireland marketing
- Market and place development: Route Development - New air routes launched

Primary research, conversion studies, and independent economic assessments are used to inform HM Treasury Green Book compliant economic models. Key impact indicators are Net Additional Economic Impact (NEI); Gross Value Added (GVA) and Full-Time Equivalent (FTE) jobs supported.

And we measure a range of non-NEI related outcomes to ensure our progress to deliver our strategic priorities is evaluated.



Outcomes

In addition to our direct economic impact, we assess activity against our ‘4S’ outcomes which are designed to ensure the benefits of tourism and events reach across Scotland: spread, spend, sustainability and satisfaction. A detailed measurement framework tracks indicators and will continue to be revised, ensuring a range of robust sources including primary research, secondary research, and qualified data points. An overview of key measures to track the below outcomes is published separately in Appendix 1 and will be updated with performance annually.

	 Spread	 Spend	 Sustainability	 Satisfaction
Staff	A diverse range of talent employed across Scotland	The right size and shape of organisation, maximising the investment to grow the visitor economy	Improved environmental footprint of our workforce and operations, driving toward net zero 2045	A positive organisational culture felt through high levels of staff satisfaction and retention
Industry	Spread of customers through the year and across Scotland	Increased yield from each visit (added value, extended stay, local spend, wraparound event itinerary, etc)	Improved environmental footprint (supply chain, climate action, etc)	Improved end-to-end stakeholder experience (including suppliers, staff, visitors, communities)
Visitor	A range of sustainable experiences with year-round and regional interest	Value for money and extension of trip/experience	Considerate of environmental and local impact of travel decisions	Personally enriching, quality experiences
Community	A balance of visitors and events year-round	Increased spend felt locally per visitor	Conservation of our culture and places – built and natural heritage	Benefits of tourism and events felt locally (employment, infrastructure, and economic return), positive engagement



WORKING TOGETHER TO DRIVE SCOTLAND'S ECONOMY

06

Scotland is highly regarded globally for its long-term approach to tourism and events and the extensive range of activity being delivered - not just by VisitScotland, but across the wider industry. Growing the visitor economy is not something we can do alone which is why partnership working is at the heart of what we do. We work hand in hand with our industry partners and stakeholders who play a critical role in developing our destinations and our regional visitor economies. And success will mean more investment into Scotland as well as more businesses supported to export from Scotland.

Identifying and leveraging partnerships with other public sector agencies will enable VisitScotland to support policy ambitions relating to wider public service reform. Being clear where we can work collaboratively as Team Scotland with partners like Scottish Enterprise, and their international arm Scottish Development International, will ensure we maximise impact, remove duplication and reinforce the Brand Scotland position and strengthen Scotland's enviable international profile.

Finally, achieving our vision to create **better places for people to live, work and visit** means looking beyond Scotland. With so many destinations facing similar challenges, we have a real opportunity not just to inspire others but to be inspired in return. We can listen and learn from some of the ambitious work taking place across the world, while sharing our own experiences. By sharing best practice with our international partners, we can drive the growth of that vibrant and dynamic visitor economy, spreading the benefits of tourism and events across the length and breadth of Scotland.

Over the next three years, with sustained and appropriate investment, we commit to:

- 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, in line with Scottish Government targets
- providing continued leadership and coordination to the national visitor management programme including management of RTIF to deliver infrastructure investment aligned to Strategic Infrastructure Plans, and resulting in an ongoing reduction in visitor management reported incidents
- agreeing event development priorities with each local authority to ensure we maximise public sector investment
- leveraging major events and global profile to deliver on key policy objectives at a local and national level, e.g. Tour de France 2027
- harnessing public and private sector investment in the visitor economy as a catalyst for collaboration to support further destination development, e.g. Inverness Castle

- delivering an annual travel trade event to bring together Scottish businesses with 220 international buyers from 20 different markets
- establishing a new business support hub and programme of free-to-access resources designed to drive sustainability
- delivering at least 7,000 engagement opportunities for Scottish businesses per annum through targeted business support activity
- 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 become 'travel trade ready' per annum
- 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 with all economic development agency partners, Scottish Government and strategic national partners throughout each year to maintain Scotland's global profile and maximise Brand Scotland via high profile events and global moments, measured via the Anholt Nation Brand Index

These commitments will be measured and evaluated on an annual basis with progress published in a supporting appendix.



© VisitScotland March 2025

VisitScotland , Waverley Court
8 East Market Street, Edinburgh, EH8 8BG

visitscotland.org

 Visit Scotland | Alba™