

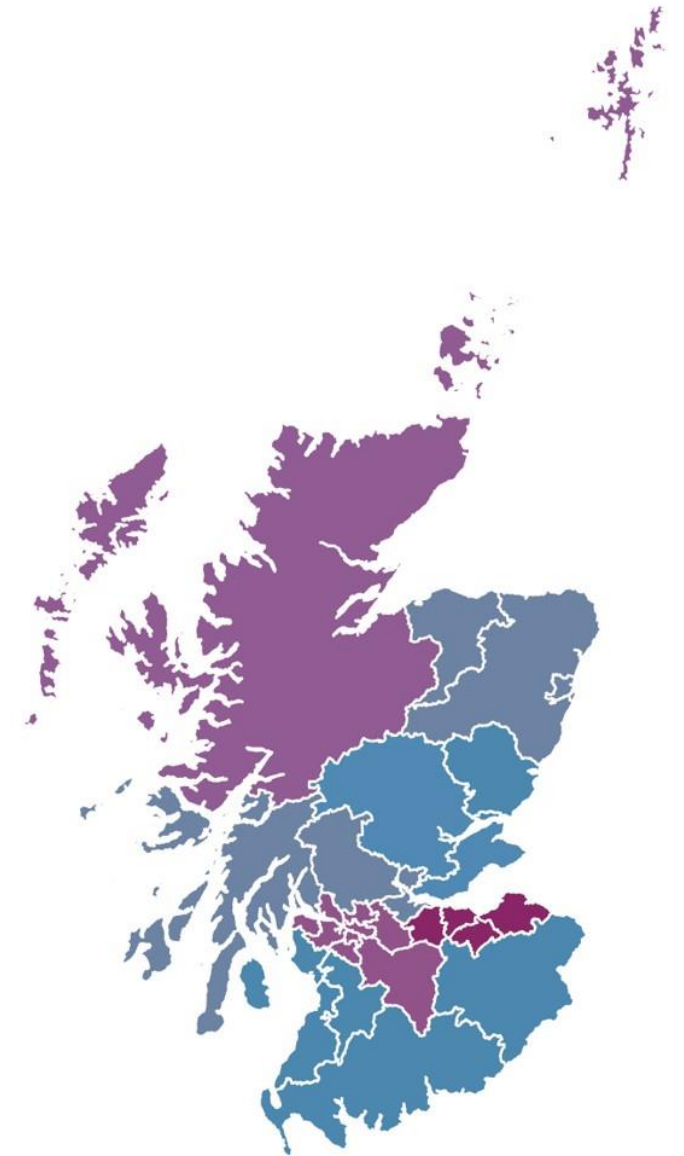
TOURISM : A FORCE FOR ECONOMIC ENVIRONMENTAL & SOCIAL GOOD

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Loch Inchard

OVERVIEW

1. An update on current trends and issues
2. An overview of strategic context for tourism
3. Challenges and opportunities for the Highlands



INSIGHTS

International Tourism

- UNTWO estimates global tourism was 43% below pre-pandemic levels in January-July 2022.
- 61% of UNTWO panel of experts expect a return of international arrivals to 2019 levels in 2024 or later.
- IPS: International visits to Scotland around 62% of pre-pandemic levels in Q1 2022

UK Consumer Sentiment

- In general, trip intentions are stable and UK adults are still planning trips over the next 12 months.
- There is still a trend for later booking with consumers taking a ‘wait and see’ approach



Labour

- COVID retrials
- BREXIT Reductions
- Demographic change



Awareness and Engagement

- On-line NetZero Portal
[Visitscotland.org](https://visitscotland.org)
- Program of support
- Best Practice case studies

Financial Picture

- Inflation
- Energy
- Interest Rates



Supporting Businesses

- Digital expectations increasingly significant
- Opportunities available

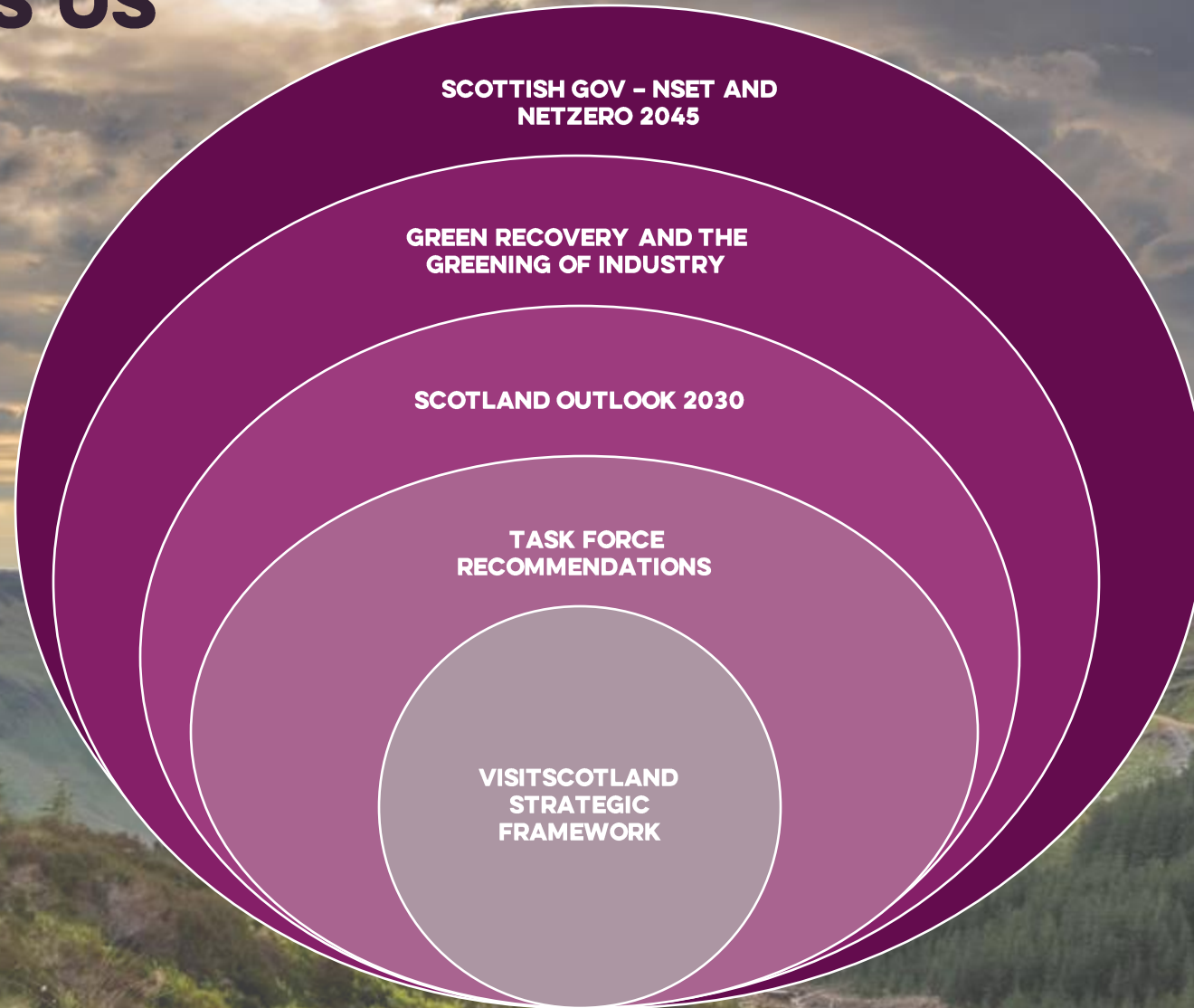


THE STRATEGIC LANDSCAPE



Nigg Bay

WHAT DRIVES US



NATIONAL STRATEGY FOR ECONOMIC TRANSFORMATION (NSET)

Figure 1: Our Vision, Ambition and Programmes of Action for Scotland's Economy by 2032



SCOTLAND OUTLOOK2030

‘developed through a shared vision and strong partnership between the Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise and Skills Development Scotland’

Vision: Scotland - we will be the leader in 21st century tourism.

Responsible Tourism Commitment :

‘Scotland’s tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045’

Outlook2030 key priorities :

- **Passionate people;** We will continue to encourage career development by improving opportunities for career mobility.
- **Thriving places;** We will actively engage local communities as valued stakeholders in tourism development and delivery.
- **Memorable Experiences;** We will encourage and enable visitors to explore more of Scotland throughout the year.
- **Diverse businesses;** We will support tourism businesses in Scotland to become more entrepreneurial, agile and resilient.



STRATEGIC CONTEXT

Scottish Government's
National Strategy for
Economic Transformation

Scotland Outlook 2030

VisitScotland's Responsible
Tourism Strategy

COVID-19 Recovery

VISITSCOTLAND STRATEGIC FRAMEWORK

Purpose: To deliver a strategic and coordinated approach to supporting and rebuilding the visitor economy in a responsible way, to ensure tourism thrives.

Vision: Scotland is a leader in 21st century tourism with a thriving, responsible visitor economy.

Key Enablers: Technology, People, Partnerships, Infrastructure, Investment

LEADING THE CHANGE



VISITSCOTLAND STRATEGIC FOCUS

Kintail

BUILDING BACK RESPONSIBLY

*Responsible Tourism requires the tourism industry, government, public sector, communities and visitors to collectively respond and **manage their economic, social and environmental impacts**, maximising the **positive impacts** and minimising the negative ones, **making all forms of tourism sustainable**.*

Responsible Tourism considers not only the needs of the visitor and the industry, but also the host communities and the environment.

Creating better places for people to live and visit.



VS RESPONSIBLE TOURISM OVERVIEW

Purpose

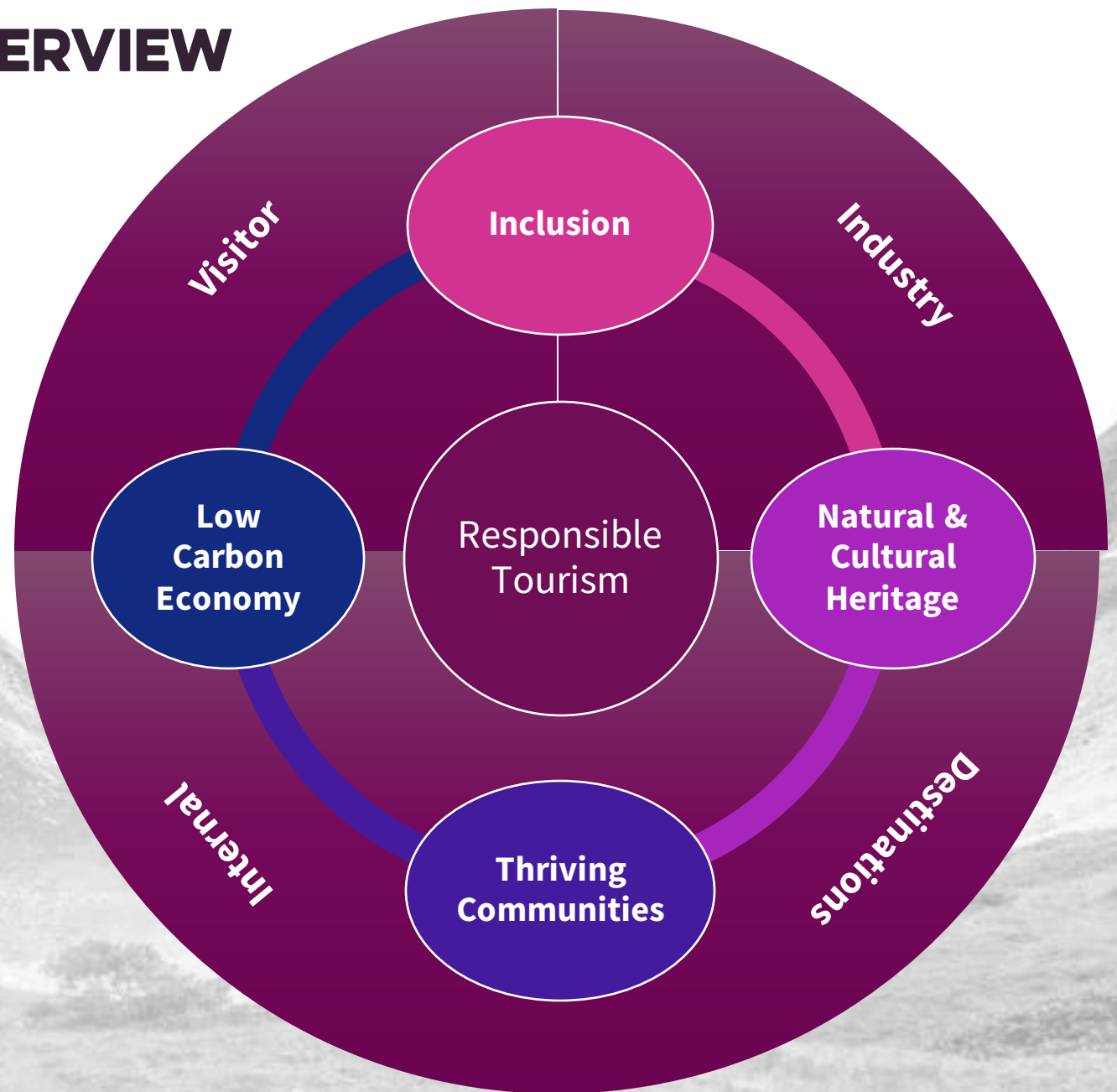
Responsible Tourism considers not only the needs of the visitor and the industry, but also the host communities and the environment.

Vision

Scotland is a globally recognised leader in responsible tourism for a sustainable future

Mission

VisitScotland will play a lead role in the development of responsible tourism practices, making Scotland one of the most economically, environmentally and socially sustainable destinations in the world.



“

Net Zero by 2045
75% emission reduction by 2030

”

DNZ ACTION PLAN

1. Net Zero advice and tools for tourism
2. Support Net Zero tourism products and itineraries
3. Engage visitors and influence low carbon choice
4. Adopt, measure, and report on agreed metrics
5. Increase collaboration between tourism and other sectors
6. Support biodiversity restoration



RESPONSIBILITY AND OPPORTUNITY



Visitors



Businesses



Destinations



Partners





ACTION

- Accreditation
- Recommendation
- Discoverability
- Collaboration

SUPPORT

- Climate Action Guide on visitscotland.org
- Industry Relationship Manager
- Sustainability Certification Fund
- Sector specific advice
- SE Net Zero Accelerator
- Business Energy Scotland



OUR VISITSCOTLAND APPROACH



- VisitScotland leading the way in evaluating the sectors and subsectors of tourism, to achieve the optimal mix in successful pursuit of NSET, Outlook 2030 and Net Zero ambitions.
- Placing responsible tourism development at the heart of Scottish tourism development.



- An increased focus on regional and place-based tourism development - supporting regional planning with clear focus on tourism and sector priorities for each region reflecting Regional Economic Strategies.



- Work with DMOs and other partners to identify the distinct products and priority sectors; identify opportunities and areas for product/infrastructure development that must be incorporated into Regional Economic Strategies
- Tourism research and insights that underpin future development

OUR 2030 OUTLOOK FOR THE HIGHLANDS

Passionate People

- Influence recruitment, skills and talent attraction
- Foster a climate of collaboration

Thriving places

- Community driven slow-tourism opportunities
- Visitor management, tourism infrastructure
- Maximise our key regional assets
- Manage tourism responsibly and build a positive reputation

Memorable Experiences

- Promote our unique culture, heritage, landscape and language
- Spirit of the Highlands & Islands
- Collaboration with destinations

Diverse Businesses

- Support businesses to become more entrepreneurial, agile and resilient
- Accelerate digital skills, bookability, and trade ready.
- Support business collaboration

VALUES DRIVEN APPROACH

Consumers increasingly want to understand the **impact** of their actions - on the people around them and the wider world



Consumers want businesses to help adapt products and communicate how they will work with them for a **better future**

- We **cannot unload the responsibility** for change on the visitor.
- We want visitors to **feel good** exploring Scotland, knowing the steps we're taking to deliver a sustainable experience.
- We can **educate in an inspiring way** to show visitors how travelling better will deliver a better, richer, feel-good experience meeting their needs for connection, wellbeing and unique experiences.

STANDING OUT TO MEET THE EMOTIONAL NEEDS OF VISITORS

Authentic
Storytelling

Social Proof

Sustainable
& Inclusive
Choices

Bookable
Experiences

REFRAMING SUCCESS



Spread

Regional spread
Seasonal spread
Industry (benefit) spread



Spend

Quality over quantity
Value over volume
Elongating visits
Shop local



Sustainability

Net zero (Energy Mgt, Waste Mgt, Climate action)
Natural & cultural heritage
Responsible, inclusive & regenerative experiences
Transport options



Satisfaction

Local satisfaction
Visitor satisfaction
Industry satisfaction
(Fair work; profile of the sector; sustainable growth)



Thank you

Loch na Gainmhich Waterfall