

ISLAND COMMUNITIES SCREENING ASSESSMENT



CHANGES TO PRODUCT INFORMATION ON VISITSCOTLAND.COM

EXECUTIVE SUMMARY

VisitScotland is required to have regard to island communities when carrying out its functions under the Islands (Scotland) Act 2018. This includes when it is considering policy, strategy or service decisions.

VisitScotland is obliged to undertake an Island Communities Impact Assessment where, in VisitScotland's opinion, a policy, strategy or service is likely to have an effect on an island community which is significantly different from its effect in other communities (including other island communities), in the area in which VisitScotland exercises its functions.

This statement covers the decision by VisitScotland to change its approach to the source of its data for product information (web listings) on visitscotland.com.

In VisitScotland's opinion, this decision will not differently impact any island community, therefore, an Island Communities Impact Assessment is not required. This document provides a summary of the information considered to support the change and the decision not to undertake a full Island Communities Impact Assessment.

BACKGROUND INFORMATION

There have been tourism business web listings on visitscotland.com for over 20 years. During this time there have been many factors that have influenced the organisation's approach to web listings, such as the changing nature of the tourism industry, the compliance and governance environment that VisitScotland operates in, and the evolving digital landscape.

Throughout this time VisitScotland has engaged widely with tourism businesses, and other stakeholders, across all areas of Scotland and all island communities. There has been consistency across all areas and island communities in how this activity has been delivered.

Currently the data source that supplies the information for tourism business web listings and the product search site functionality comes from a bespoke destination management system (DMS) supplied by Simpleview. Tourism businesses update their information in the DMS via an individual login. Changes made in this system update the business's information on VisitScotland.com, but nowhere else.

INSIGHTS

Advances in digital technology and subsequent shifts in traveller behaviours have diminished the overall value to VisitScotland in offering and maintaining a web listings platform. Insights gathered over the past three years highlight the following key challenges:

- **Low user engagement:** from January 2021 to March 2024, only 4.6% of users interacted with Product Search functionality on visitscotland.com.
- **Minimal industry participation:** industry engagement with the DMS has dropped markedly, with only 15.9% of web listings updated within the past 12 months.
- **Online travel agencies and individual business websites:** 91.5% of businesses currently listed in the DMS already maintain their own digital presence elsewhere using their own website or other online travel agencies.
- **Evolution of organic search¹:**
 - Search engines have already evolved to understand the intent behind search queries, enabling them to deliver more relevant search results for users. This has resulted in most individual business websites outranking VisitScotland web listings when a user searches for a specific business, negating the need for businesses to maintain and update a web listing on VisitScotland.com.
 - In addition, when a user searches for a business or place near their location, they will find local results across Google in places like Maps and Search. To improve organic visibility, the most effective action a business can take is to maintain a Google Business Profile.²
- **Environmental impact:** web listings accounted for 41% of VisitScotland.com’s total carbon usage (mostly via organic search as noted above) in 2023. With user engagement declining and most businesses maintaining their web presence elsewhere, much of this carbon usage can be classified as ‘wasted’.

Research undertaken by VisitBritain in 2022 found that travellers tend to use National Tourism Organisation (NTO) websites (like visitscotland.com) for inspiration rather than booking.³ This is further supported by a 2023 study carried out by Expedia, which suggests that social media, NTO websites and search engines play the largest role at the inspiration and research stages of the customer journey.⁴ In addition, VisitScotland’s latest visitor survey data (2023)⁵ found that only 3% of visitors across markets used visitscotland.com to book accommodation.

Lastly, a qualitative study undertaken by Designit on behalf of VisitScotland in late 2024/early 2025 discovered that hyper-personalisation is transforming every stage of the trip planning process, including booking.⁶ Travellers that took part in the study had their own trusted suite of online travel agencies for booking accommodation and activities. These tools (e.g. Kayak, Booking.com, Get Your Guide, etc) set the expectation for advanced customisation that were not met by equivalent functionality on visitscotland.com.

However, Designit’s research also highlighted the importance of seamlessly connecting travellers with tourism businesses earlier in the customer journey to help them build concepts for a trip. Visitscotland.com could effectively meet this user need by leveraging market leading third-party data to surface up-to-date product information across the website whilst referring more traffic directly to businesses.

¹ An overview of Google algorithm updates can be found at <https://www.searchenginejournal.com/google-algorithm-history/>.

² [Google Business Profile Help](#)

³ [VisitBritain – MIDAS \(2022\)](#)

⁴ [Expedia – Path to Purchase Study \(2023\)](#)

⁵ [VisitScotland Visitor Survey \(2023\)](#)

⁶ [VisitScotland & Designit – Trip Planning Research Report \(January 2025\)](#)

THE CHANGE

VisitScotland has been carrying out strategic reviews across many of its activities, to ensure it continues to deliver the best economic impact for Scotland. As part of the review process, VisitScotland has considered the role it plays in serving product information to visitors and how that should be undertaken in the future.

VisitScotland has decided to replace the data source for business information to a service that better reflects the change in consumer behaviour, the evolving digital landscape and the needs of tourism businesses.

The objective of the change is to:

- Provide up-to-date information on tourism businesses and events across VisitScotland's websites to help potential visitors quickly form concepts for a trip to Scotland.
- Enhance coverage of tourism businesses and events across Scotland.
- Improve user experience and ensure functionality on VisitScotland websites meets the AA level of Web Content Accessibility Guidelines ([WCAG 2.2](#)).
- Make it easier for tourism businesses and events to maintain visibility across VisitScotland websites, including business owners with lower levels of digital literacy.
- Reduce environmental impact of VisitScotland websites by streamlining functionality and reducing duplication across the digital landscape.

In future, the data for tourism business information will be obtained from third parties data streams, including Google, rather than bespoke VisitScotland in-house systems. Many tourism businesses already have a Google Business Profile, which they update regularly, alongside their own website. VisitScotland's Business Enquiry and Support Programme will provide support for businesses that don't currently have a Google Business Profile to ensure they maintain visibility on VisitScotland websites. The VisitScotland Business Support Hub can be accessed online at <https://support.visitscotland.org>, via email at business.support@visitscotland.com, or by phone on 01463 244111.

VisitScotland.com users can currently book accommodation through the availability search engine on the website. As the majority of potential visitors use national tourism websites for inspiration and research, this functionality will no longer be available and website users will be signposted directly to business websites or other travel intermediaries instead.

Google data in combination with VisitScotland regions data will be utilised in map functionality and destination content. There will no longer be individual towns and villages pages on VisitScotland.com as this information is well catered for elsewhere in the digital landscape.

THE PLAN

As this is a change to a website, the same approach will be taken across Scotland, including all island communities and will ensure the same outcomes for tourism businesses and visitors across all locations, including all island communities. There will be no differentiation between businesses in different locations.

VisitScotland will phase this activity. The first phase will focus on VisitScotland.com and will look to scale the activity up to deliver on its other websites in future phases.

For the small percentage of businesses that do not have an existing Google Business Profile, VisitScotland's Business Support Programme will provide guidance on how businesses can maintain their visibility across VisitScotland websites. This guidance will be the same for all locations, including all island communities.

ISLAND COMMUNITY CONSIDERATIONS

The approach to web listings has always been delivered in the same way for all Scottish locations, whether mainland or island communities. Therefore, the decision to change our approach to web listings is the same for all locations and does not discriminate between all island communities and other communities.

The impact of the decision to change the approach to web listings is the same across the country, including all island communities, where we compare similar businesses.

ENGAGEMENT WITH STAKEHOLDERS

VisitScotland has engaged with a range of industry stakeholders during the review and project scoping process. These have included representatives from the Association of Scotland's Self-Caterers, Association of Scottish Visitor Attractions, Scottish Agritourism and other bodies representing the sector.

During this engagement, no feedback has suggested that this decision would differently or negatively affect an island community, in comparison with any other island or non-island community.

During this engagement, no feedback has suggested that this decision would create any potential barriers for tourism businesses or visitors within any island community.

IN CONCLUSION

A full impact assessment is not required. In considering the proposal, VisitScotland has seen no evidence to suggest the effect on an island community is significantly different from its effect on other communities (including other island communities). The impact of the decision to change the source of data for product information is the same for all similar businesses and stakeholders across the country, including all island communities.

There is no evidence to indicate that any island impacts require to be taken into account.

VisitScotland will publish this screening assessment.

Screening assessment considered by:	Head of Digital Delivery	March 2025 draft for review
Screening assessment approved by:	Chief Technology Officer	December 2025 for publication