








# SCOTLAND OUTLOOK 2030 TRACKER

National Tourism Strategy Performance Tracker

March 2026



		Performance improving	Performance maintaining	Performance worsening	Performance to be confirmed
	<b>Our memorable experiences</b>				
	Visitor satisfaction		●		
	Visitor wellbeing				●
	Inclusivity			●	
	Accessibility				●
	Seasonal spread	●			
	Regional spread			●	
	Visitor spend	●			
	<b>Our passionate people</b>				
	Fair work : pay		●		
	Fair work: contractually secure work				*Not possible to include this year
	Fair work : opportunity to progress		●		
	Skills shortage	●			
	Diverse workforce: sex		●		
	Diverse workforce : age		●		
	Diverse workforce : disability				*Not possible to include this year
	Diverse workforce : ethnicity				*Not possible to include this year
	<b>Our thriving places</b>				
	Community satisfaction		●		
	Community engagement				●
	Sustainable tourism				●
	Tourism management			●	
	Social enterprises		●		
	<b>Our diverse businesses</b>				
	Entrepreneurship	●			
	Business survival		●		
	Environmental sustainability		●		
	<b>Responsible tourism</b>				
	Growth in tourism value		●		
	Employment contribution		●		
	Employment growth		●		

\*It has not been possible to provide data for this indicator this year due to concerns around the quality of recent estimates obtained from the ONS Annual Population Survey. This is due to falling response rates to the survey in recent years which has resulted in increased volatility and uncertainty for these estimates. For further information, please see: [here](#)



**Visitor spend** ↑

Performance improving: spend per visit is up in real terms from the previous year.

**Seasonal spread** ↑

Performance improving: the seasonal spread ratio improved from the prior year, with visit numbers becoming more equal between seasons.

**Visitor satisfaction** ↔

Performance maintaining: visitor satisfaction is up only modestly from the last survey in 2016.

**Accessibility** —

Performance to be confirmed: no prior year data currently available.

**Visitor wellbeing** —

Performance to be confirmed: no prior year data currently available.

**Regional spread** ↓

Performance worsening: the regional spread worsened from the prior year, with visit numbers becoming less equal between regions.

**Inclusivity** ↓

Performance worsening: the proportion of domestic overnight visits taken by visitors with an impairment fell from the prior year.

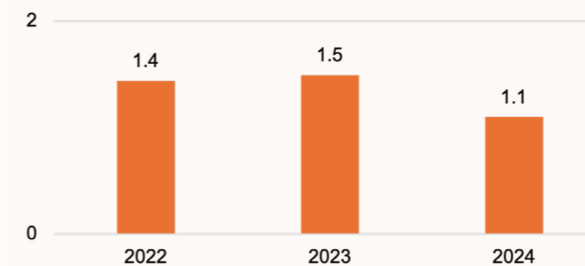
**Visitor spend**

Average visitor expenditure per visit (2024 prices)



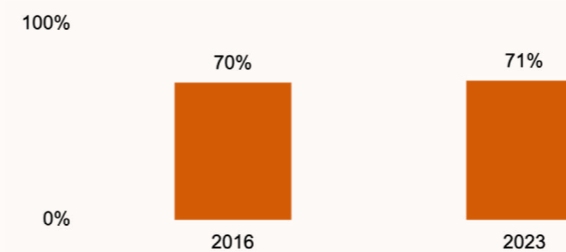
**Seasonal spread**

Ratio of domestic and overseas visits in Scotland in peak quarter to lowest quarter



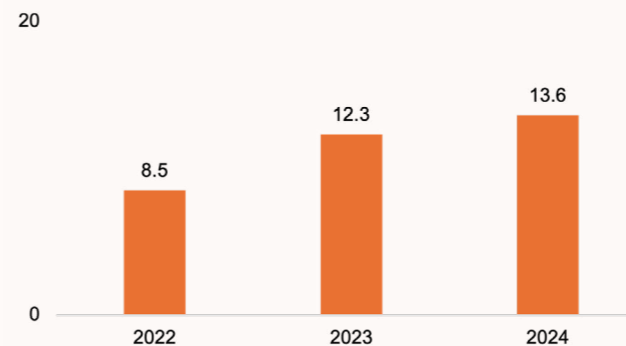
**Visitor satisfaction**

% of visitors rating their experience as a 9 or 10 out of 10



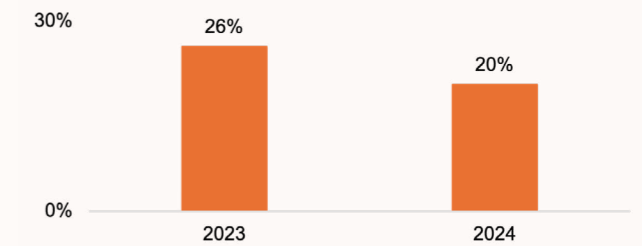
**Regional spread**

Ratio of domestic and overseas visits in Scotland in most visited region to least visited region



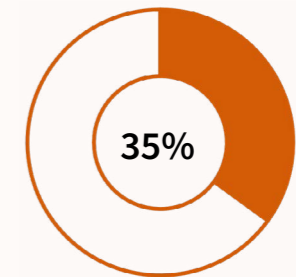
**Inclusivity**

% of domestic overnight visits in Scotland taken by visitors with an impairment



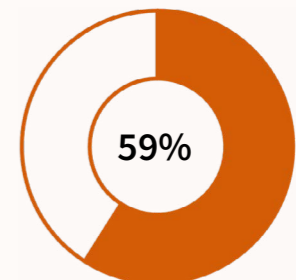
**Accessibility**

% of visitors to Scotland with access requirements stating it was very easy to get around during their trip (2023)



**Visitor wellbeing**

% of visitors reporting that their trip to Scotland enhanced their physical, mental and emotional wellbeing (2023)





**Skills shortages ↑**

Performance improving: the proportion of businesses with skills shortage vacancies is less than half that of the prior year.

**Diverse workforce: sex ↔**

Performance maintaining: the estimated proportion in employment who are women increased from the prior year, with women now accounting for over half the workforce, but the change is not statistically significant.

**Fair work: opportunity to progress ↔**

Performance maintaining: the proportion of businesses providing training increased from the prior year but the change is not statistically significant.

**Fair work: pay ↔**

Performance maintaining: the estimated proportion in employment paid the real living wage increased marginally from the prior year but the change is not statistically significant.

**Diverse workforce: age ↔**

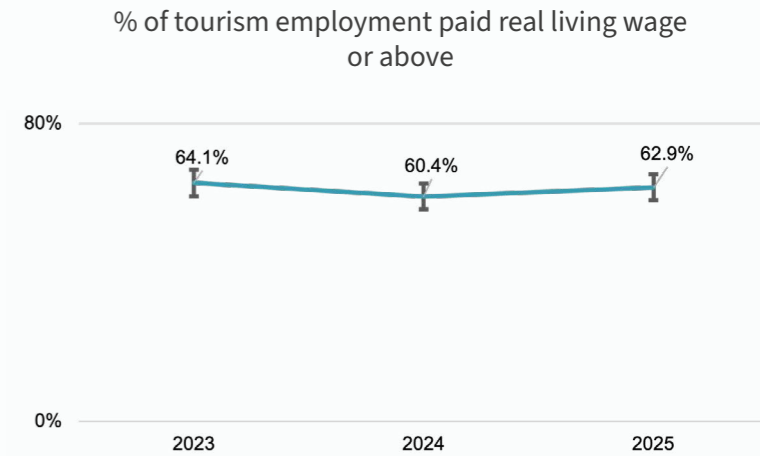
Performance maintaining: the estimated proportion in employment who are young (aged 16-24) decreased from the prior year but the change is not statistically significant.

Diverse workforce: disability  
Diverse workforce: ethnicity  
Fair work: secure employment  
Not possible to include this year.

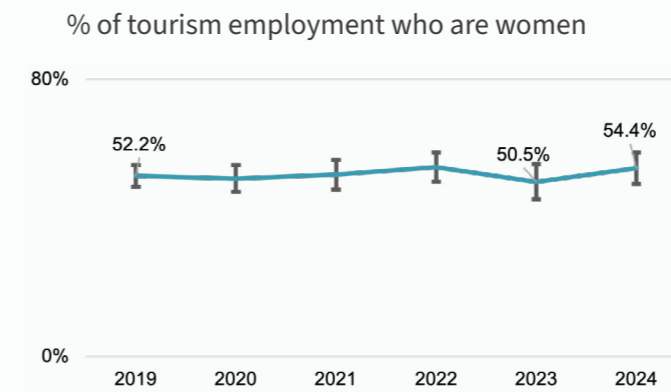
**Skills shortage**



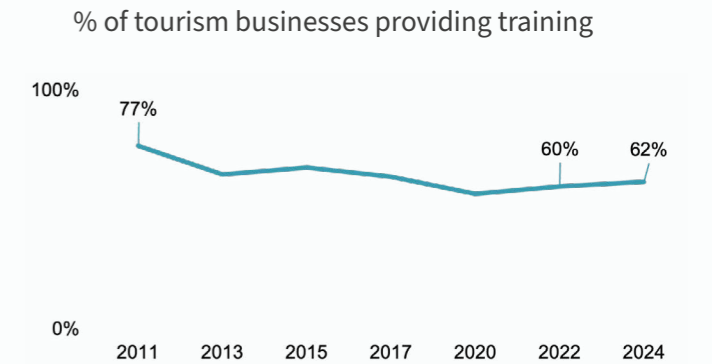
**Fair work: pay**



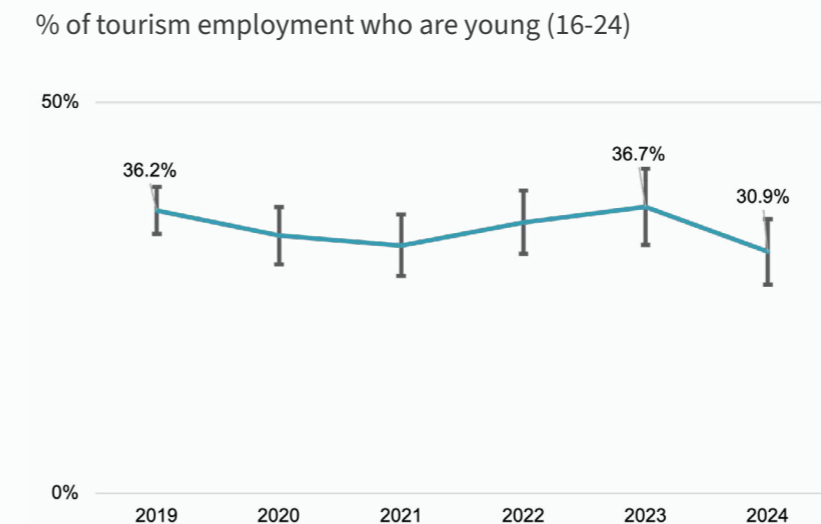
**Diverse workforce: sex**



**Fair work: opportunity to progress**



**Diverse workforce: age**



The black error bars indicate the extent to which the actual figure could differ from the central estimate provided. Footnote e of the 'Indicator measures and source' table provides further information on the need for this.



**Community satisfaction ↔**

Performance maintaining: the proportion agreeing tourism has a positive impact fell only marginally from the last survey in 2020.

**Social enterprises ↔**

Performance maintaining: the number of tourism related social enterprises remained constant from the previous census in 2021.

**Community engagement —**

Performance to be confirmed: no prior year data currently available.

**Sustainable tourism —**

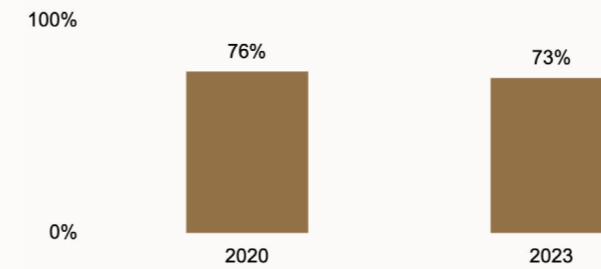
Performance to be confirmed: no prior year data currently available.

**Tourism management ↓**

Performance worsening: the proportion agreeing there is adequate provision for tourists fell from the last survey in 2020.

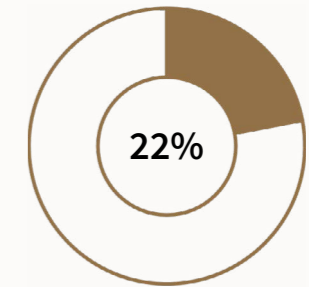
**Community satisfaction**

% agreeing that tourism has a positive impact on their local community (islands-only)



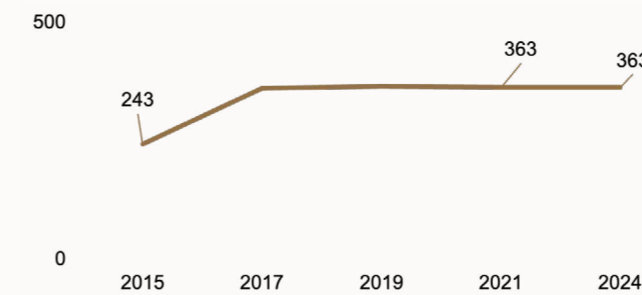
**Sustainable tourism**

% agreeing tourism is managed sustainably in their local community (2023, islands-only)



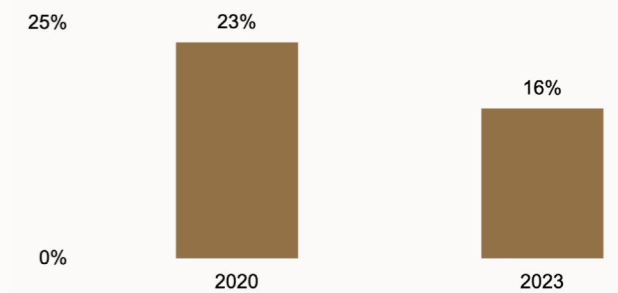
**Social enterprises**

Number of tourism-related social enterprises



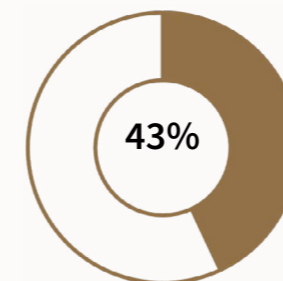
**Tourism management**

% agreeing there is adequate provision for the number of tourists (islands-only)



**Community engagement**

% agreeing their local community is engaged in tourism development and delivery (2023, islands-only)





**Entrepreneurship ↑**

Performance improving: the business birth rate increased from the prior year.

**Business survival ↔**

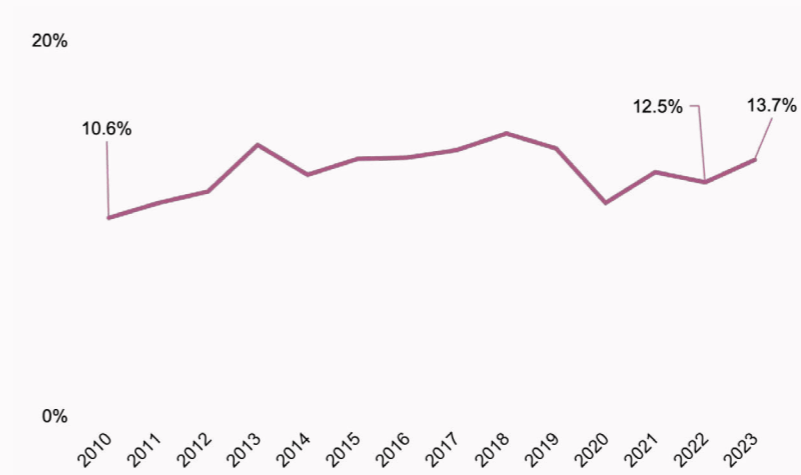
Performance maintaining: the 3-year survival rate of new tourism businesses decreased marginally from the prior year but the change is not statistically significant.

**Environmental sustainability ↔**

Performance maintaining: the proportion of tourism businesses taking action to reduce carbon emissions increased from the prior year but the change is not statistically significant.

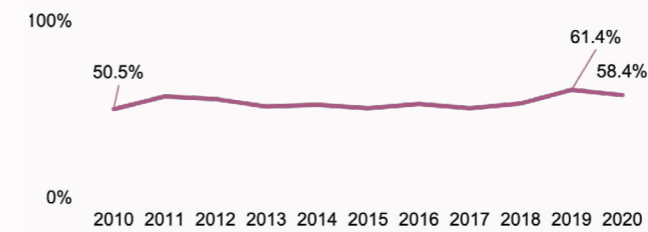
**Entrepreneurship**

Birth rate of tourism businesses (by birth year)



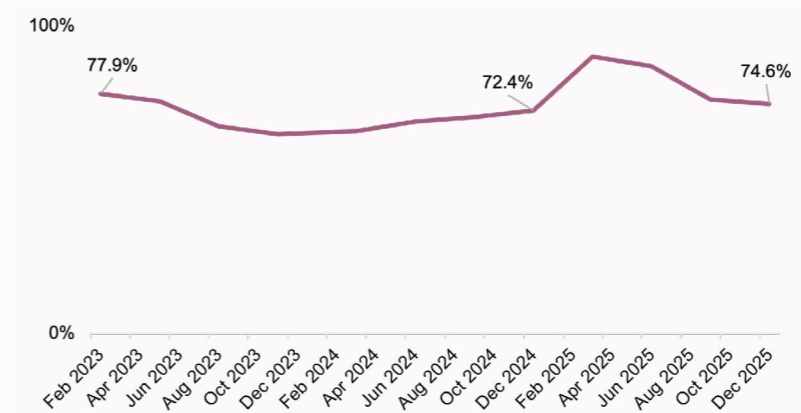
**Business survival**

3 year survival rate of new tourism businesses (by birth year)



**Environmental sustainability**

% of tourism businesses taking action to reduce carbon emissions





**Tourism value** ↔

Performance maintaining: tourism gross domestic product (output) in real prices was up only marginally from the prior year but the change is not statistically significant.

**Employment level** ↔

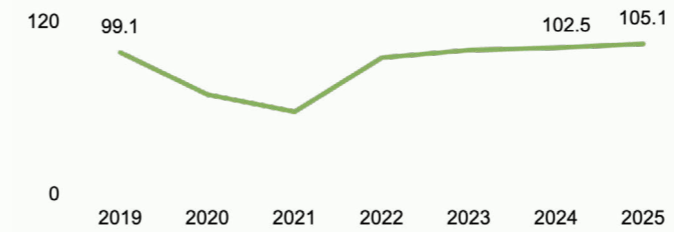
Performance maintaining: tourism employment was down marginally from the prior year but the change is not statistically significant.

**Employment contribution** ↔

Performance maintaining: tourism employment as a proportion of total Scottish employment was down marginally from the prior year but the change is not statistically significant.

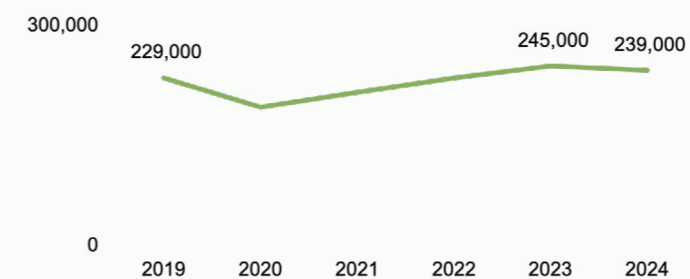
**Tourism value**

Annual GDP Index for tourism sector (2019 = 100)



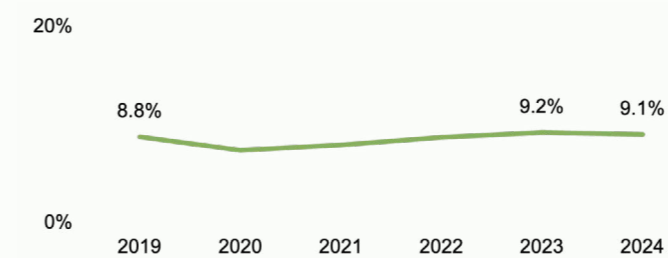
**Employment level**

Level of tourism employment



**Employment contribution**

Tourism employment as a proportion of total employment



## About the Scotland Outlook 2030 Performance Tracker

The purpose of the Scotland Outlook 2030 Tracker is to monitor progress against the objectives set out in Scotland's national tourism strategy, Scotland Outlook 2030.

Each indicator within the Tracker relates to at least one of the Scotland Outlook 2030 objectives as set out in the Scotland Outlook 2030 Strategic Priorities and Commitments table below. Further detail on the indicator measures and sources is set out in the second table below. The indicators will be kept under review and will be adjusted or added to if and when new data becomes available.

Criteria for change: For the purposes of the Tracker, any difference within +/- 5% of the prior year's figure suggests that the position is more likely to be maintaining than showing any change. An increase of 5% or more suggests the position is improving while a decrease of 5% or more suggests the position is worsening. Indicators based on Annual Population Survey (APS) and Annual Survey of Hours and Earnings (ASHE) data are subject to additional significance testing. Footnote e of the 'Indicator measures and source' table provides further information on the need for this.

## Scotland Outlook 2030 Strategic Priorities and Commitments

Strategic Priority	Commitment
<b>Our diverse business:</b> We will build business resilience, sustainability and profitability	Support tourism businesses in Scotland to become more entrepreneurial, agile and resilient
	Establish measures to help Scottish businesses commit to sustainable practices
<b>Our memorable experiences:</b> We will provide the very best, authentic and memorable experiences	Nurture Scotland's tourism assets to deliver high quality, memorable experiences that benefit visitors and the places they visit
	Encourage and enable visitors to explore more of Scotland throughout the year
	Ensure Scotland is an inclusive and accessible destination, enabling all visitors to travel widely and enjoy the full range of the country's visitor experiences
<b>Our thriving places:</b> We will create and develop a sustainable destination together	Ensure places across Scotland can develop and manage tourism effectively and responsibly
	Actively engage local communities as valued stakeholders in tourism development and delivery
	Enable the whole of Scotland and more sectors of the economy to benefit from tourism demand by taking a strategic approach to developing the right products in the right places
<b>Our passionate people:</b> We will attract, develop and retain a skilled, committed, diverse and valued workforce	Ensure that Scotland has sufficient people to create an outstanding workforce, ready to meet the requirements of the 21st century workplace
	Support and enable the adoption of Fair Work practices in Scotland's tourism sector
	Continue to encourage career development by improving opportunities for career mobility
	Actively champion diversity across the tourism sector, so that it reflects a modern Scotland
<b>Responsible tourism</b>	Scotland's tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045
	We will ensure that tourism leads to improved community wellbeing and nurtures thriving places across Scotland
	We will ensure the value of tourism to Scotland's economy continues to increase and delivers shared prosperity for all, by encouraging the right growth in the right places

## Indicator measures and sources

	Indicator name	Indicator measure	Source
Our memorable experiences	Visitor satisfaction	Percentage of visitors rating their experience in Scotland as a 9 or 10 out of 10	<a href="#">Scotland Visitor Survey</a> , VisitScotland
	Visitor wellbeing	Percentage of visitors reporting that their trip in Scotland enhanced their physical, mental and emotional wellbeing (9 or 10 out of 10)	<a href="#">Scotland Visitor Survey</a> , VisitScotland
	Inclusivity	Percentage of domestic overnight visits in Scotland taken by visitors with an impairment	<a href="#">Great Britain Tourism Survey</a> , VisitScotland
	Accessibility	Percentage of visitors to Scotland with access requirements stating it was very easy to get around during their trip (9 or 10 out of 10)	<a href="#">Scotland Visitor Survey</a> , VisitScotland
	Seasonal spread	Ratio of total (domestic and overseas) number of visits in Scotland in peak quarter to lowest quarter <sup>a</sup>	<a href="#">International Passenger Survey</a> , ONS, <a href="#">Great Britain Tourism Survey</a> , <a href="#">Great Britain Day Visits Survey</a> , VisitScotland
	Regional spread	Ratio of total (domestic and overseas) number of visits in Scotland's most visited region (north/east/south/west) to least visited region <sup>a b</sup>	<a href="#">International Passenger Survey</a> , ONS, <a href="#">Great Britain Tourism Survey</a> , <a href="#">Great Britain Day Visits Survey</a> , VisitScotland
	Visitor spend	Average total (domestic and overseas) visitor spend per visit in Scotland	<a href="#">International Passenger Survey</a> , ONS, <a href="#">Great Britain Tourism Survey</a> , <a href="#">Great Britain Day Visits Survey</a> , VisitScotland
Our passionate people	Fair work: pay	Percentage of tourism employment (18+) in Scotland paid the Real Living Wage or above <sup>1 d</sup>	<a href="#">Scottish Government analysis of ONS Annual Survey of Hours and Earnings</a>
	Fair work: contractually secure work	Percentage of tourism employment in Scotland (16+) who have a permanent contract <sup>d j</sup>	Scottish Government analysis of ONS Annual Population Survey
	Fair work: opportunity to progress	Percentage of tourism businesses in Scotland providing training <sup>c</sup>	<a href="#">UK Employer Skills Survey - Scotland report</a> , Scottish Government
	Skills shortages	Percentage of tourism businesses in Scotland reporting skills shortage vacancies <sup>c</sup>	<a href="#">UK Employer Skills Survey - Scotland report</a> , Scottish Government
	Diverse workforce: sex	Percentage of tourism employment (16+) in Scotland who are women <sup>d e</sup>	Scottish Government analysis of ONS Annual Population Survey
	Diverse workforce: age	Percentage of tourism employment (16+) in Scotland who are young (16-24) <sup>d e</sup>	Scottish Government analysis of ONS Annual Population Survey
	Diverse workforce: disability	Percentage of tourism employment (16-64) in Scotland who are disabled <sup>d j</sup>	Scottish Government analysis of ONS Annual Population Survey
	Diverse workforce: ethnicity	Percentage of tourism employment (16+) in Scotland who are from a minority ethnic background <sup>d j</sup>	Scottish Government analysis of ONS Annual Population Survey

	Indicator name	Indicator measure	Source
Our thriving places	Community satisfaction	Percentage of Scottish islands residents agreeing that tourism has a positive impact on their local area <sup>f</sup>	<a href="#">Scottish Islands Survey</a> , Scottish Government
	Community engagement	Percentage of Scottish islands residents agreeing their local community is engaged in tourism development and delivery <sup>f</sup>	<a href="#">Scottish Islands Survey</a> , Scottish Government
	Sustainable tourism	Percentage of Scottish islands residents agreeing tourism is managed sustainably in their local area <sup>f</sup>	<a href="#">Scottish Islands Survey</a> , Scottish Government
	Tourism management	Percentage of Scottish islands residents agreeing there is adequate provision for the number of tourists <sup>f</sup>	<a href="#">Scottish Islands Survey</a> , Scottish Government
	Social enterprises	Number of tourism-related social enterprises in Scotland	<a href="#">Social Enterprise in Scotland Census</a> , <a href="#">Social Enterprise Scotland</a>
Our diverse businesses	Entrepreneurship	Tourism business birth rate in Scotland <sup>d g h</sup>	Business Demography, ONS (via <a href="#">Industry Statistics Database</a> )
	Business survival	3-year survival rate of new tourism business in Scotland <sup>d g</sup>	Business Demography, ONS (via <a href="#">Industry Statistics Database</a> )
	Environmental sustainability	Percentage of tourism businesses taking action to reduce carbon emissions <sup>c i</sup>	<a href="#">Business Insights and Conditions Survey</a> , Scottish Government
Responsible tourism	Tourism value	Average annual tourism gross value added in Scotland at constant prices <sup>d</sup>	Quarterly GDP Index - gross value added at constant prices, Scottish Government (via <a href="#">Industry Statistics Database</a> )
	Employment level	Tourism employment in Scotland <sup>d</sup>	Business Register and Employment Survey, ONS (via <a href="#">Industry Statistics Database</a> )
	Employment contribution	Tourism employment in Scotland as a proportion of total Scottish employment <sup>d</sup>	Business Register and Employment Survey, ONS (via <a href="#">Industry Statistics Database</a> )

#### Notes

<sup>a</sup> A ratio of 1.0 indicates an equal spread in visitor numbers across regions/seasons. The indicator is said to be worsening if the ratio is increasing.

<sup>b</sup> The region visited by each visitor is measured differently in domestic and overseas visits statistics. For domestic visits, it is defined as the main region visited whilst for overseas visits, all regions visited are captured.

<sup>c</sup> Tourism sector defined as the Accommodation and Food Services Sector - SIC 55: Accommodation and SIC 56: Food and beverage serving activities.

<sup>d</sup> Tourism sector defined using the Scottish Government's Sustainable Tourism (tourism related industries) definition as set out [here](#).

<sup>e</sup> ONS have conducted analysis to assess the impact of falling sample sizes over recent years on the quality of APS estimates. ONS state that although the APS estimates are robust at National and headline regional level, there are concerns with the quality of estimates for smaller groups of the population. This assessment of the APS estimates alongside the fact that APS estimates have not been reweighted to new population estimates has led to the suspension of the accreditation of all APS-based outputs. It is still appropriate to use the APS estimates included in this tracker. However, users are advised to note the increased uncertainty around these estimates in recent years, which is illustrated in the charts using the black error bars which indicate the extent to which the actual figure could differ from the estimate provided. For further information please see [here](#).

<sup>f</sup> Currently, data is only available for the Scottish islands. Data covering the whole of Scotland will be available in late 2026 from the Scottish Household Survey 2025.

<sup>g</sup> These figures do not represent a complete picture of business activity as only businesses that are registered for VAT and/or operate a PAYE scheme are included.

<sup>h</sup> The business birth rate is defined as business births as a proportion of the active business population. Active businesses are defined as those businesses that had either turnover or employment at any time during the reference period.

<sup>i</sup> These figures only cover businesses that are registered for VAT and/or operate a PAYE scheme with 10+ employees and a presence in Scotland.

<sup>j</sup> It has not been possible to provide data for this indicator this year due to concerns around the quality of recent estimates from the data source, the Annual Population Survey. This is due to significantly falling response rates to the survey in recent years which has resulted in increased volatility and uncertainty in the estimates provided. For further information, please see: [here](#)