Welcome

What do you think of when you consider Scotland as a tourism destination? Visitor surveys,\(^1\) conducted over the years by VisitScotland repeatedly identifies landscape (along with heritage, culture and people/welcome) as a key motivational element in selecting Scotland as a tourism destination.

A developing trend amongst the traveller has been the desire for transformational tourism, diverging from the historically consumer based transactional tourism. The aspiration to attain selffulfilment through travel is in many markets around the world having an impact on the type of destinations visited and the activities engaged in. More often it is as a result of this developing trend that it involves travel to discover new or undiscovered destinations. Scotland is well placed with its inspiring elements of landscape, heritage and culture to capitalise on this phenomenon but needs to be aware of maintaining a sustainable approach to delivery of tourism to preserve the essence of what visitors look for when they come here..

The media regularly highlight the pressure of over-tourism in destinations such as Venice, Barcelona and Amsterdam. Recent consumer surveys highlight awareness for the need of sustainable tourism by travellers and the growing demand for advice and products that support this desire for low impact but deep dive experiential tourism.

Increasingly travellers awareness of the impact travel has on the local and global environment as a result of their tourism aspirations is another factor that determines the choices made.

Governments and public bodies are also aware of the impact of tourism. Tourism as an economic sector supports jobs, communities and cultural heritage. It needs to be delivered in a sustainable way. The recent announcement by the Scottish Government of the global climate emergency\(^2\) highlights how innovation in transport delivery, tourism technology and policy can contribute to the aspirations of tackling the problems associated with climate change. Certainly the fragility of Scotland's landscape which may result from changes to the environment could effect this essential asset contributing to the sustainability of tourism within Scotland.

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\(^1\) [https://www.visitscotland.org/researchinsights/about-our-visitors/visitor-journey.](https://www.visitscotland.org/researchinsights/about-our-visitors/visitor-journey.)

Sustainable Development

Sustainable Tourism

Transport and Mobility are essential components of the tourism experience. It provides connectivity between destinations for both domestic and international visitors. It also connects attractions, accommodation and other tourism services.

Tourism, as a growth sector of the economy is central to supporting national and regional economies, especially in rural areas but it can put pressure on existing transport services and infrastructure. However, planned sustainable mobility will be a key element to delivering solutions for a climate-resilient future for tourism.

In this paper we explore the evidence of how Scotland’s tourism sector can deliver a sustainable product to our visitors. Focus is given to the role of transport, a major element in achieving a carbon neutral future but also a significant driver of tourism potential.

To frame this examination of sustainable tourism we can reference the 17 Sustainable Development Goals (SDGs) of the 2030 United Nations Agenda for Sustainable Development set on the 1 January 2016. Over the next fifteen years, with these new Goals that universally apply to all, countries will mobilise efforts to work towards ending all forms of poverty, fight inequalities and tackle climate change, while ensuring that no-one is left behind.

Based on the universal, integrated and transformative vision the UNSDGs provide, the UN World Tourism Organisation, the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism is focused on a few key goals to contribute to the delivery of sustainable tourism. Among the goals focused on are Goal 8- Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all and Goal 12- Ensure sustainable Consumption and Production patterns. It is these goals that define sustainable tourism, the delicate balance of ensuring that communities are supported through tourism enterprise and jobs whilst protecting the natural, cultural and heritage environment which stimulates and contributes to a destinations attractiveness to visit.

3 https://www.un.org/sustainabledevelopment/developmentagenda/
4 http://tourism4sdgs.org/
Exploring Sustainable Mobility

Objectives of Sustainable Tourism

What do we mean when we say sustainable tourism, and what is its relationship to transport, specifically in rural regions of Scotland.

Expressed simply, sustainable tourism as defined by the United Nations World Tourism Organisation as “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”

UNESCO suggest the aim of sustainable tourism is to maximise benefits such as job creation, foreign exchange earnings and new infrastructure while safeguarding cultural heritage and living culture and minimising negative environmental and social impacts, especially of mass tourism. Identify the benefits and problems of mass tourism.

Looking at the definitions above it is clear that establishing the balance of economic growth with social cohesion through employment and cultural preservation alongside protecting the natural environment, will deliver the tourism needed to ensure rural (and urban) destinations can contribute to the sustainable development goals but flourish as sustainable destinations.

It cannot be denied that at present air travel remains a major component of Scottish Tourism. The majority of international visitors to Scotland transit via air travel through Scottish or other UK hubs. To contribute to sustainable tourism today we can introduce sustainable mobility. It is through the provision of a range of transport options like different modes of public transport, bicycles, walking routes or electric vehicle infrastructure which will create the solutions that ensure the movement of visitors while mitigating climate change and creating climate-safe destinations.

In the future it will be developments in “slow tourism” and integrated international rail networks and sea routes which will become the viable options both in terms of economies of scale and preferential choice amongst travellers to cover long distances.

5 http://sdt.unwto.org/content/about-us-5
6 http://www.unesco.org/education/tisf/docs/module_16.doc
7 https://wwf.panda.org/our_work/projects/one_planet_cities/sustainable_mobility/
Exploring Sustainable Mobility

Consumer Drivers, Trends & Stats

**Visitor Trends**
1.8 million (or 27%) of domestic overnight holiday trips to Scotland were to rural areas. This contributed £442 million to the Scottish rural economy.

36% of GB resident overnight trips used public transport for the longest part of their journey to Scotland. That equates to 13,000 overnight trips in Scotland involving public transport.8

<table>
<thead>
<tr>
<th>International Visitors</th>
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<tr>
<td>44% go the countryside</td>
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<tr>
<td>28% visit a national park</td>
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<tr>
<td>43% visit the coast 9</td>
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<tr>
<td>40% use public transport10</td>
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98% of Scotland is defined as “Rural”11

About 20% of Scots Residents live in rural areas.

Rural Scotland is defined as settlements with a population of less than 3,000.11

**The Value of our Natural Assets**

Scotland’s mountains and moorland was calculated at £5.2 billion12

£11.3 billion from Coastal Regions, Lochs & Reservoirs and Rivers and Canals

These sectors represent around 50% of the total recreational asset value of Scotland’s Natural Capital

**Traveller Perceptions of Sustainable Tourism**

A 2019 survey by National Geographic13 found strong support amongst US travellers for sustainability. The survey found a sizable percentage willing to prioritise sustainable travel in the future. Awareness of what sustainable travel actually means was also identified.

It’s Generation Z that embrace sustainable travel. Research by Booking.com14 found half of Gen Z plan to visit less known destinations to minimise environmental impact. Gen Z also more likely to use sustainable transport at their destination. Volunteering, meeting local people and giving something back to the destination are important elements of travel.

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10 [https://www.2.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification](https://www.2.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification)
Implementing Sustainable Tourism

Sustainable mobility can be delivered in a number of ways. The greenerScotland.org initiative from the Scottish Government, provides a range of suggestions to decarbonise travel. For tourism, it is about promoting sustainable options to visitors. It is also about sharing inspiring journeys that sustainable travel will enhance. The following section looks at some of the options available and examples of where it’s working for tourism today.

**SMARTER TRAVEL:** Planning travel using public transport can be a daunting prospect for visitors. Understanding what services are available, where do they go and how much do they cost can understandably result in preference to use personal transport like car hire or your own vehicle. Mobility as a Service (MaaS) is a concept to deliver easy, digital access to travel information, so travellers can be better informed as to the different ways to undertake their journey. Solutions can include personalised travel requirements in a single travel app for example.

**SLOW TRAVEL:** The ‘slow travel’ trend is all about decreasing your carbon footprint, whilst enjoying a deeper sense of place when you travel. Many travellers are looking for simpler, lower impact ways to make travelling more sustainable. Taking public transport or active travel (walking or cycling) allows the traveller to immerse themselves in the natural beauty of a destination without the pressures of operating their own vehicle.

**Case Study: Cairngorms Connected**
An EU funded project sponsored by HITRANS to support an emerging strategy to reorganise transport in order to tackle mobility and sustainability challenges by offering an alternative to car use in sparsely populated areas. Phase 1 of the project is “Cairngorms Connected” and is investigating existing Data, payment/ticketing, existing services and systems. Potential solutions may emerge as, for instance, combining mobility and societal services as part of a single, seamless offering that is made available to users via app subscriptions.

**Case Study: Glasgow to Fort William Bus Service**
Glasgow is one of the primary entry points for both domestic and international visitors who arrive in Scotland by air travel or public transport from elsewhere in the UK. One of the low-cost and environmentally friendly excursions providing access to outdoor activities and unique places to stay is the three hour scheduled bus journey to Fort William, ‘Outdoor Capital of the UK’. 
Implementing Sustainable Tourism

**ACTIVE TRAVEL:** Active travel is when journeys are made by physically active means, like walking or cycling. Clearly reducing the number of car miles will benefit the environment and reduce congestion at popular visitor locations. To benefit tourism it can be delivered in a number of ways. Visitors may still need to undertake the longest part of their journey (from home to their accommodation provider) using their own vehicle, but preferably using public transport. Once arrived at their destination they can minimise ongoing transport costs by walking or cycling to visitor attractions, activity providers or any other destination within their location.

Visitors and locals benefit from the Scottish Outdoor Access Code which allows access rights to most land and inland waterways to experience Scotland (check local legislation and restrictions at outdooraccess-scotland.scot)

Tourism providers can appeal to the active traveller by promoting the services walkers and cyclists need as part of their journey by participating in schemes such as the Walkers and Cyclist Welcome Quality Assurance schemes. But for visitors there are wild camping and bothy experiences that can become part of the overall experience that perhaps Scotland can excel at such as rural Dark Skies, regional food and drink delicacies and the wealth of cultural and heritage that can make exploring Scotland so attractive to the active traveller.

**Case Study 1: The Annandale Way Long Distance Trail**
The Annandale Way is a 56 mile long distance walking route starting in the hills above Moffat and follows the River Annan down to the Solway Estuary at Annan and can be walked in around 4 or 5 days from either north to south or south to north. The annandaleway.org website supports the traveller with information on public transport options to the start points, recommendations for accommodation and luggage transport and informative references to the heritage and natural history to look out for during the journey.

**Case Study 2: Bike-Packing**
Bike-Packing is in simple terms undertaking long distance hiking but on a bike. Generally using a mountain biking and with minimalist camping equipment, it provides the freedom of multi-day wild hiking, with the enjoyment of riding off-road. Scotland has some world beating remote and challenging trails to cycle from forestry tracks to canal paths and there is approximately 2,371 miles of National Cycle Network routes. The West Island Trail was developed in partnership with BikepackingScotland.com and the SYHA Hostelling Scotland. The trail is a 332 km loop connecting the hostels in Oban, Lochranza and Port Charlotte in the west of Scotland.

**Case Study 3: Isle of Cumbrae eBike Touring**
Active travel doesn’t have to involve epic feats of physical exertion. With over 60 years of trading Maps of Millport hire bicycles and eBike to visitors to explore the island of Cumbrae. A loop of the island is 10 miles but shorter routes are available.

**Case Study 4: The Great Glen Canoe Trail** - This 96 km stretch of the Caledonian Canal was one of the first trails of its kind in Scotland. From Fort William to Inverness, the Caledonian Canal offering fabulous options for paddlers of all abilities and can be enjoyed as a long distance canoeing challenge or a relaxing day paddle.
Public Transport: An objective of greening transport is about education and offering options for better choices. We aspire to decarbonise travel, minimise impact and distribute visitors throughout Scotland so everywhere benefits from tourism—increasing use of public transport is central to that plan.

Tourism businesses can benefit from the availability and promotion of public transport access. Scotland has an extensive network of rail and bus routes. According to the UK natural capital accounts for mountains, moorlands and heath ecosystems (2017), Scotland has 111 train stations and 12,599 bus stops in areas defined as mountain, moorland and heath. There are 66 train stations and 6,219 bus stops within 1 km of a long distance path. This accounts for 11,174 km of path accessible by public transport.15

The benefits come from reducing road traffic but also by ensuring local public transport routes remain economically viable to locals through their use by visitors. Indeed 44% of hikers in Switzerland use public transport which has developed into an integrated network allowing coordinated travel options to spread visitors throughout regions minimising environmental pressure on any one location and distributing expenditure to the whole visitor economy.

Case Study 1: The Scotrail Highland Rover
The Highland Rover ticket provides unlimited rail travel for any four days in an eight-day period that starts with your first journey. You can travel any time (though some specific limitations apply) and hop on, hop off as there’s no need to book the train. The route takes in the west and north regions and there are almost 100 stops. The Highland Rover also provides free coach travel from Oban and Fort William to Inverness, and from Thurso to Scrabster. Finally the ticket includes ferries also so visitors can travel to Mull and Skye with CalMac free, or get 20% off on Northlink Ferries to Orkney and Shetland. With the bike storage available on Scotrail trains this offers excellent flexibility to a sustainable tour of Scotland for hikers, bikers or those wanting to experience sustainable mobility and stunning landscapes.

Case Study 2: Bike Friendly Bus Journeys
Borders Buses have introduced bike friendly double decker buses on their X62 service covering Edinburgh – Melrose/Galashields. With a nod towards Mobility as a Service (MaaS) the Borders Buses app provides a live tracker which allows the user to see if the next bus is “bike friendly”.

Case Study 3: The Eco-Tourism Business
The Lazy Duck, near Nethy Bridge has organically evolved over four decades. Providing small scale, sustainable places to stay all year round. You have the choice of a hostel, camp-site and 3 eco-mountain huts. Promoting slow living and wellness, the Lazy Duck is both a 4 star VisitScotland quality assured provider and Green Tourism Gold Award holder.

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15 https://www.ons.gov.uk/economy/environmentalaccounts/datasets/ukanaturalcapitalformountainsmoorlandsandhealthreferencecctables
Exploring Sustainable Mobility

Looking to Brighter Futures

Tourism can be a key for implementing many global solutions for challenges such as climate change, poverty reduction, waste reduction, preserving eco-systems and moving the world to a more sustainable planet.

It is ultimately in the interests of the Scottish visitor economy to have authentic local culture and heritage, pollution or waste free habitats and vibrant active communities all of which are supported through managed and sustainable tourism policies and promotion. Sustainable tourism is seen to be among a range of global solutions and strategies for the transition to future sustainability.

Further factors which are seen as central to delivering sustainable tourism are the challenges of seasonality and regionality. This is when destinations typically experience greatest stresses on their natural and social environments during the “high” season. Addressing seasonality requires destinations to be accessible with a range of transport options, provide a choice of year round accommodation, attractions and activities which promote the location. It is reported that inefficient organisation of mobility can lead to a decrease in the attractiveness of a destination. It is therefore through the cooperation of the tourism industry, transport providers, local and public authorities that visitor destinations can remain competitive and attractive to their consumer market.

It is going to require a combination of interventions to ensure there is a long-term sustainable future for tourism. From clear government policies, investment in infrastructure delivering carbon neutral services, education to visitors on their impact and contribution to national and regional strategic goals and collaboration between public bodies, tourism businesses and local communities to ensure that the natural and cultural environment of Scotland continues to inspire and motivate visitors and contribute to a sustainable and vibrant destination now and into the future.
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Disclaimer. The work presented in this paper combines previously published research from VisitScotland with primary and secondary research and interviews conducted by VisitScotland’s Trends Team specifically for this study. Case studies provided in this paper are illustrative examples of the suggested solutions described, alternative providers and solutions may be available. VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omission.

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