

Karen Christie - Tourism Strategy Project Manager
Scottish Tourism Alliance

Maas Consultation Workshop
26th March 2019



SCOTTISH TOURISM IN NUMBERS

TOURISM CONTRIBUTES
AROUND £6BN
OF GDP TO THE
SCOTTISH ECONOMY,
5% OF THE TOTAL



IN 2016, SCOTLAND'S TOP FIVE MARKETS
FOR INTERNATIONAL VISITORS WERE:

**USA, GERMANY, FRANCE,
CANADA, POLAND** (BY VOLUME)

**USA, GERMANY, CANADA,
AUSTRALIA, ITALY** (BY VALUE)



**TOURISM EMPLOYS
207,000 PEOPLE,**
AROUND ONE IN 12
JOBS IN THE ECONOMY



IN 2016 **ALMOST
£4.8 BILLION** WAS
SPENT BY OVERNIGHT
VISITORS TO SCOTLAND



**OVER 2.7 MILLION
OVERSEAS VISITORS**
CAME TO SCOTLAND IN 2016 -
UP 17% SINCE 2011



EACH ADDITIONAL
£100 MILLION
SPENT BY TOURISTS
**SUPPORTS AROUND
£65 MILLION OF GDP**
IN THE WIDER ECONOMY

SCOTLAND IS HOME TO
**SIX UNESCO WORLD
HERITAGE SITES**
ONE FIFTH OF
THE UK'S TOTAL**



SCOTLAND WAS VOTED AS
**THE MOST BEAUTIFUL
AND MOST WELCOMING
COUNTRY IN THE WORLD***
BY ROUGH GUIDE READERS IN 2017



TOURISM BUSINESSES

CONFIDENT OR CONCERNED?

REPORT ON THE FACTORS AFFECTING TOURISM BUSINESSES IN SCOTLAND

THE SCOTTISH TOURISM ALLIANCE
WWW.SCOTTISHTOURISMANLLIANCE.CO.UK
SEPTEMBER 2017



Scots tourism sector 'gazing over a cliff' warns expert



SCOTTISH
TOURISM
ALLIANCE

Your voice in tourism matters



Scottish tourism sector facing "unprecedented" challenge

Key research project announced to assess sector's rising costs

15/03/2017

→ What's your view on this? Post your comments here:



The Scottish Tourism Alliance

SCOTTISH TOURISM INDUSTRY
RECOMMENDATIONS TO THE
SCOTTISH GOVERNMENT
BUDGET & SPENDING REVIEW

“The STA also leads the facilitation, co-ordination, ongoing development and delivery of the **National Strategy: Tourism Scotland 2020 & The Food Tourism Scotland Action Plan**”

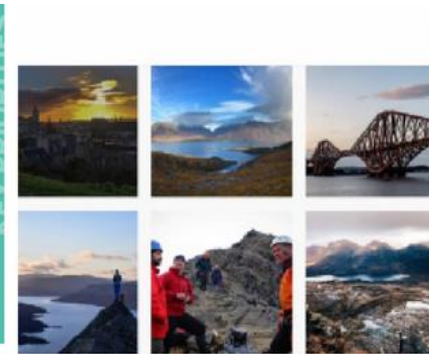


DIGITAL

LEADERSHIP

A Strategic Framework for Scotland's Marine Tourism Sector

Awakening the Giant



TOURISM SCOTLAND 2020

YEARLY REVIEW | MARCH 2018

A STRATEGY FOR LEADERSHIP AND GROWTH

THE FUTURE OF OUR INDUSTRY IN OUR HANDS

INFLUENCE INVESTMENT

QUALITY OF THE VISITOR EXPERIENCE

PEOPLE MAKE HERITAGE

HERITAGE TOURISM 2020



SCOTTISH TOURISM ALLIANCE

Your voice in tourism matters

A STRATEGY FOR LEADERSHIP AND GROWTH
THE **FUTURE**
OF OUR INDUSTRY
IN OUR **HANDS**



Our **COLLECTIVE** Vision

To make Scotland a destination of **first choice** for a **high quality, value for money** and **memorable customer experience**, delivered by **skilled and passionate people**.

Our Visitors – An Overview

14.9
Million
Overnight
Visits in 2017
(+4.3%)



78% Domestic Overnight
22% International Inbound



46% Scots Residents
54% Rest of GB

21% North America
59% Europe
(51%) E.U.
20% Rest of World

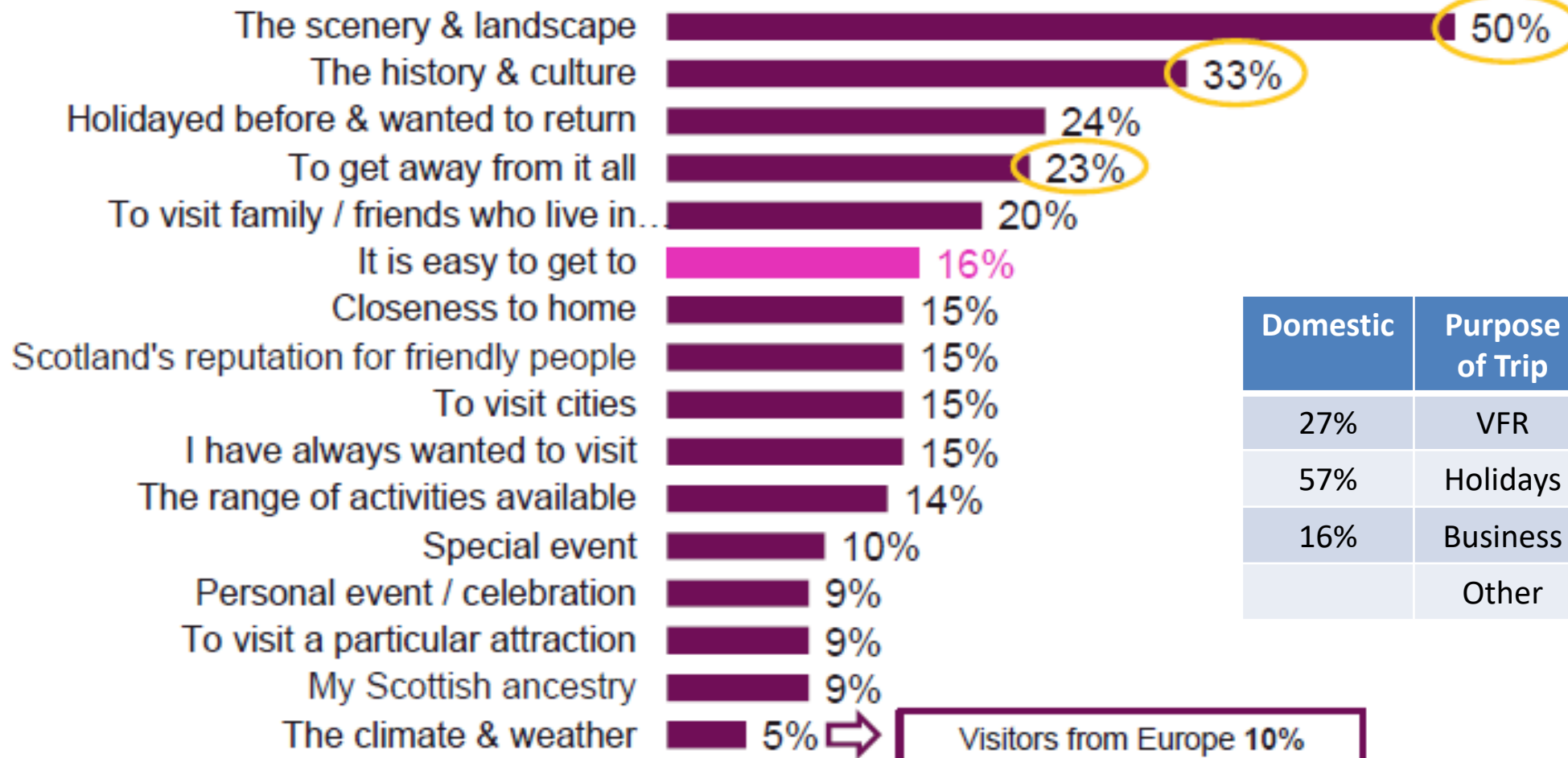
151
Million
Day
Visits in 2017
(+ 6.3%)



95% Scots Residents
5% Rest of GB

Why Do They Come To Scotland?

Scotland's scenery and landscape remains a key motivation to visit, as does its history and culture. Other drivers vary by market and visitor type.



Domestic	Purpose of Trip	International
27%	VFR	24%
57%	Holidays	58%
16%	Business	16%
	Other	1%

Q10 Thinking broadly about your decision to choose Scotland for your holiday or short break, what was it that attracted you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (11743)

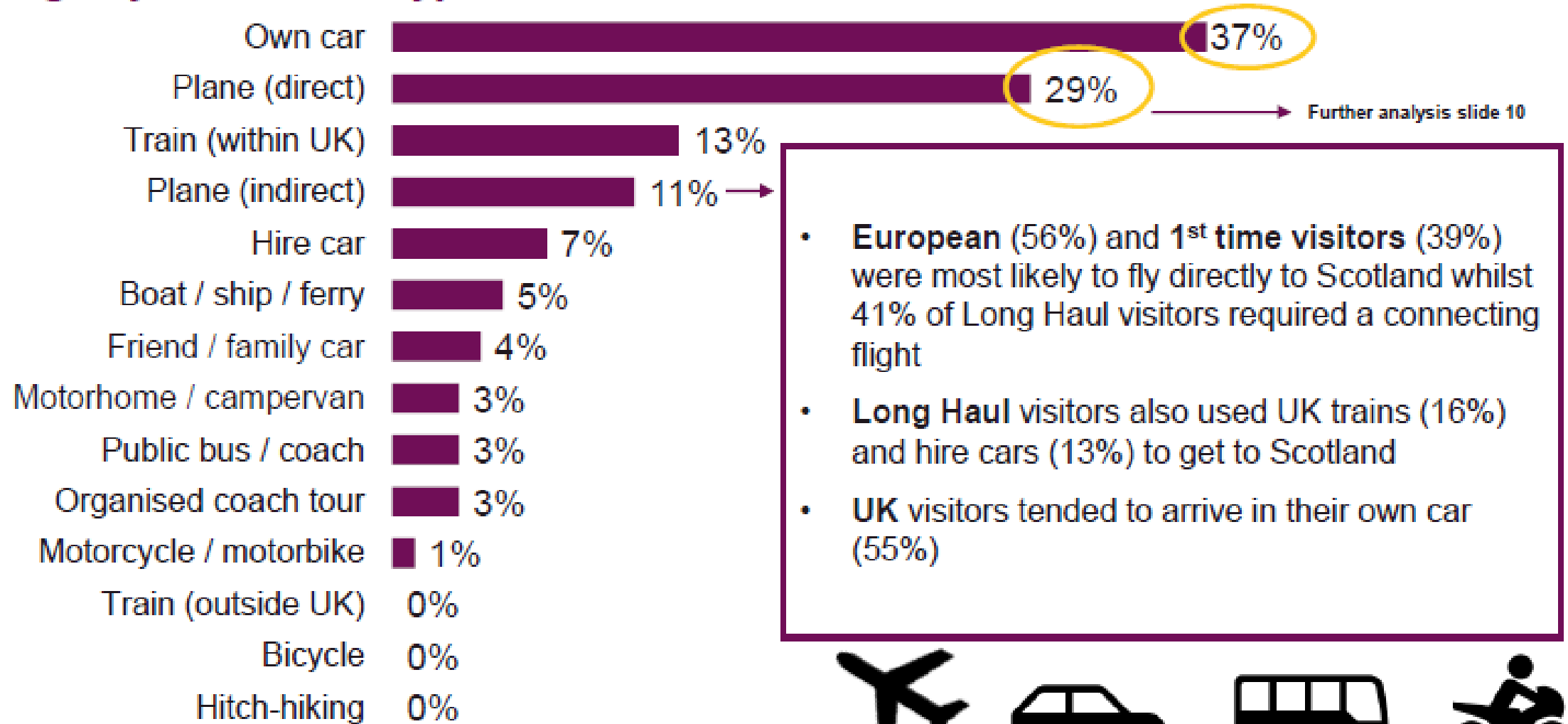
What Attracts Visitors To Scotland?



SCOTLAND | ALBA

How Do They Get Here?

The main methods of transport to Scotland were car or plane but differences emerge by market and type of visitor



Q9 How did you travel to Scotland? Base: S1 All non Scots (8953)

Mode Of Travel To Scotland

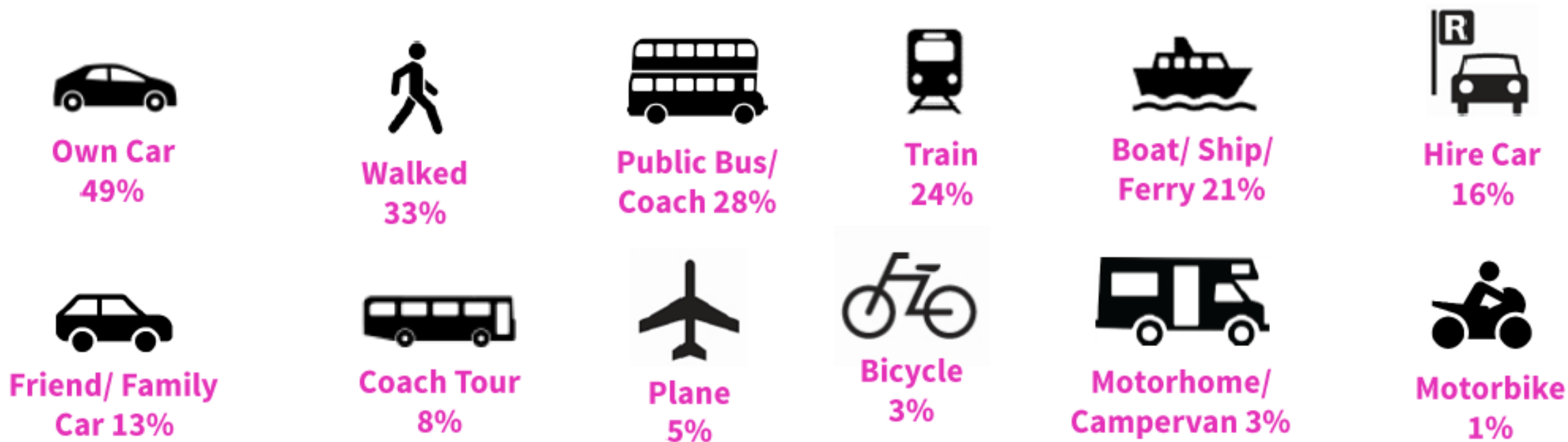


jump

SCOTLAND | ALBA

How Do They Move Around?

First time and Long Haul visitors used multiple forms of transport. Domestic and repeat visitors largely travelled around in their own car.



Q26 What types of transport did you use while you were [in Scotland](#)?

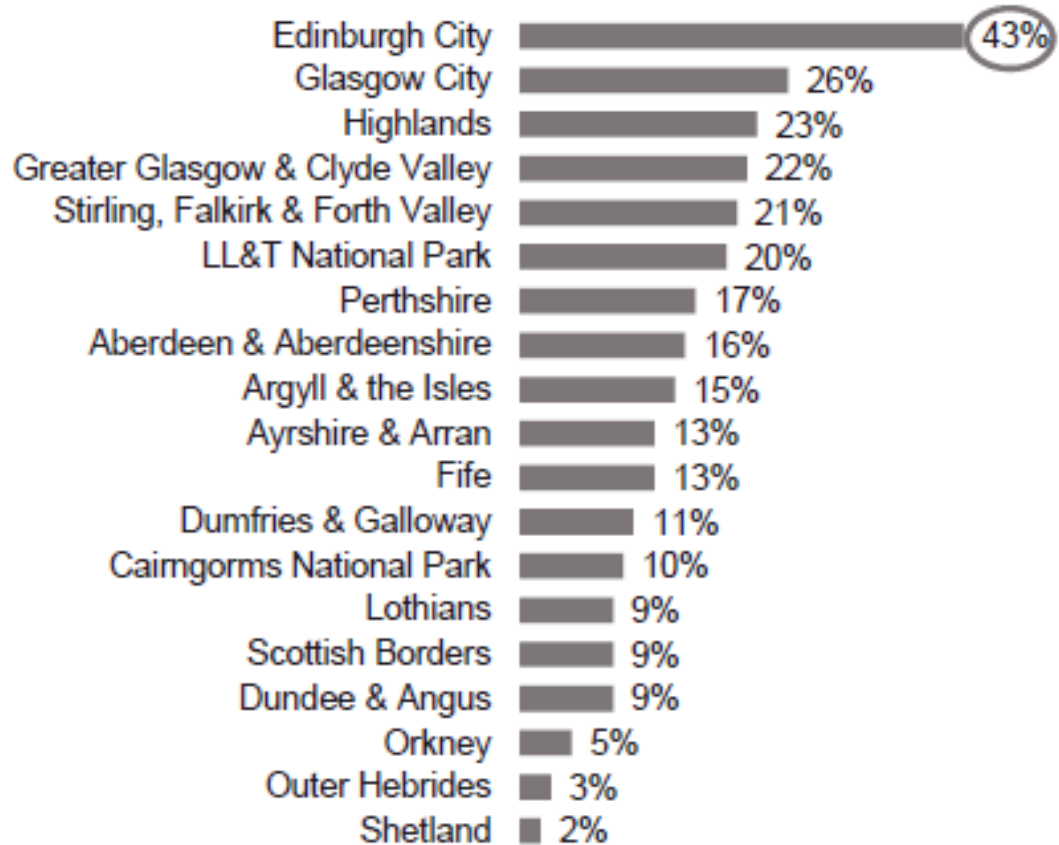
Transport Used In Scotland

jump
research

SCOTLAND | ALBA

Where Do They Go?

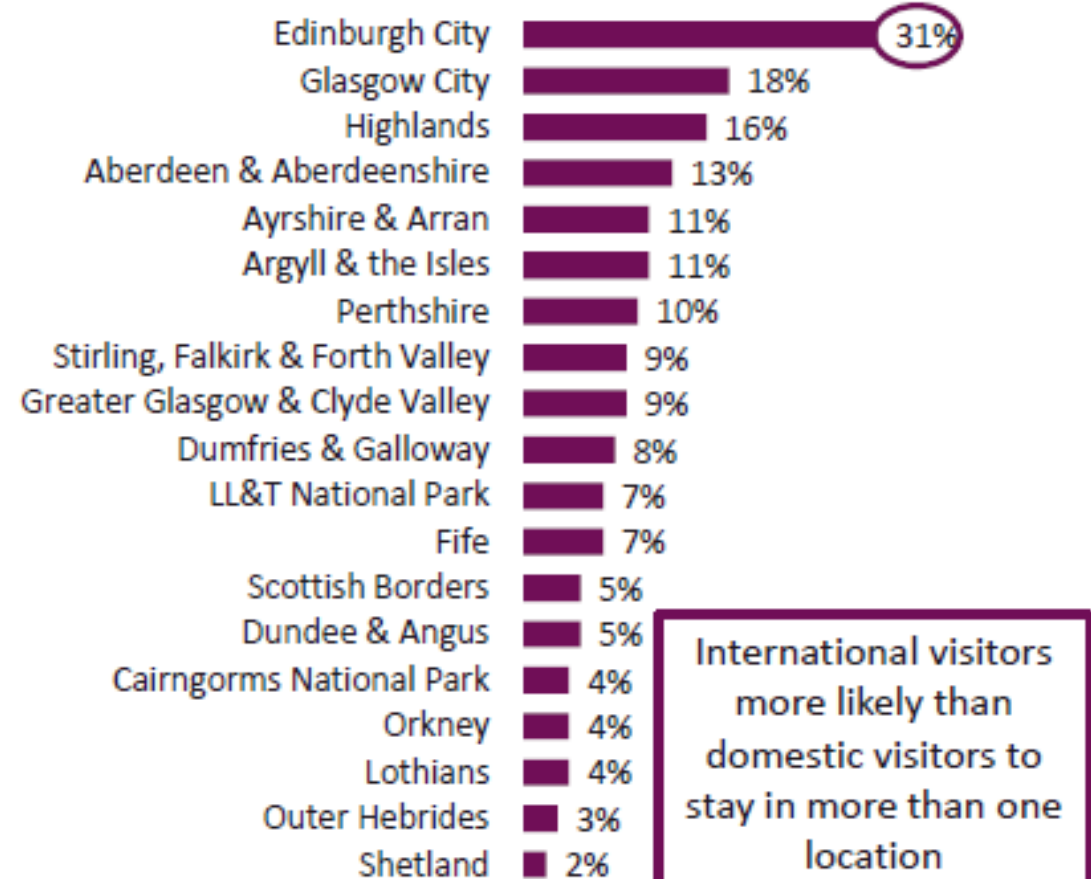
Number of areas visited differs greatly by market – the further visitors have travelled, the more areas they visit. Edinburgh City was the most visited location, by two-fifths of visitors.



Q1 Which areas of Scotland did you visit on this trip? Base: S2 All (2999)

Areas Of Scotland Visited On This Trip

Top three regions where visitors stayed overnight are consistent with the top three areas visited. Some other areas show differences in visitation vs overnight stays.



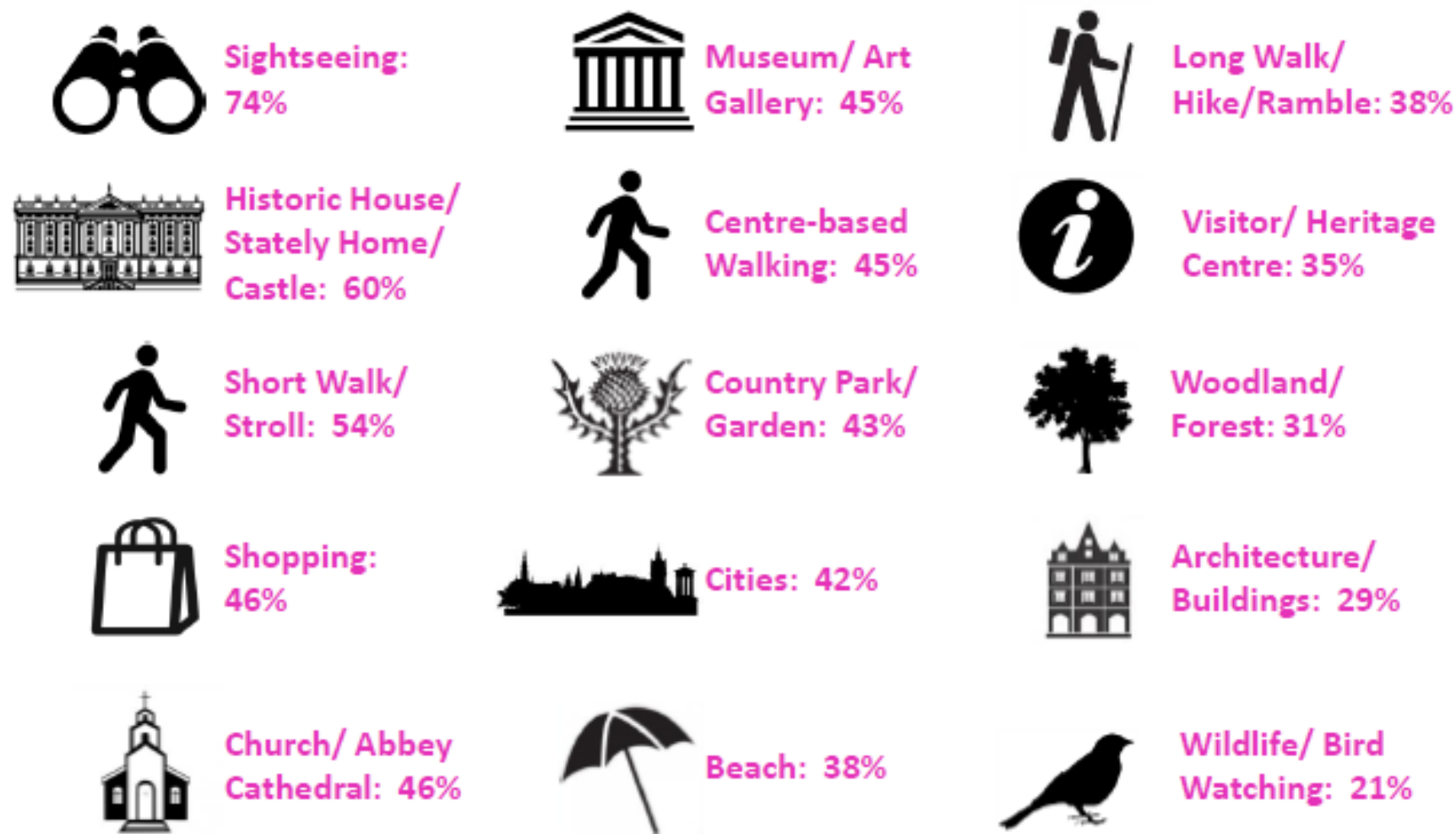
Q3 And which of these areas did you stay overnight in? Base: S2 All (2999)

Areas Stayed Overnight

International visitors more likely than domestic visitors to stay in more than one location

What Do they Do?

Visitors engaged in a range of activities in Scotland with international visitors being most active



Top Activities

- International (esp. Long Haul) and 1st time visitors are much more active, especially for sightseeing activities
- Whilst domestic and repeat visitors are more focused on outdoors and sports

Q30 Which, if any, of the following activities did you take part in during your trip to Scotland? Base: S2 All (1608)

Activities Undertaken (1)

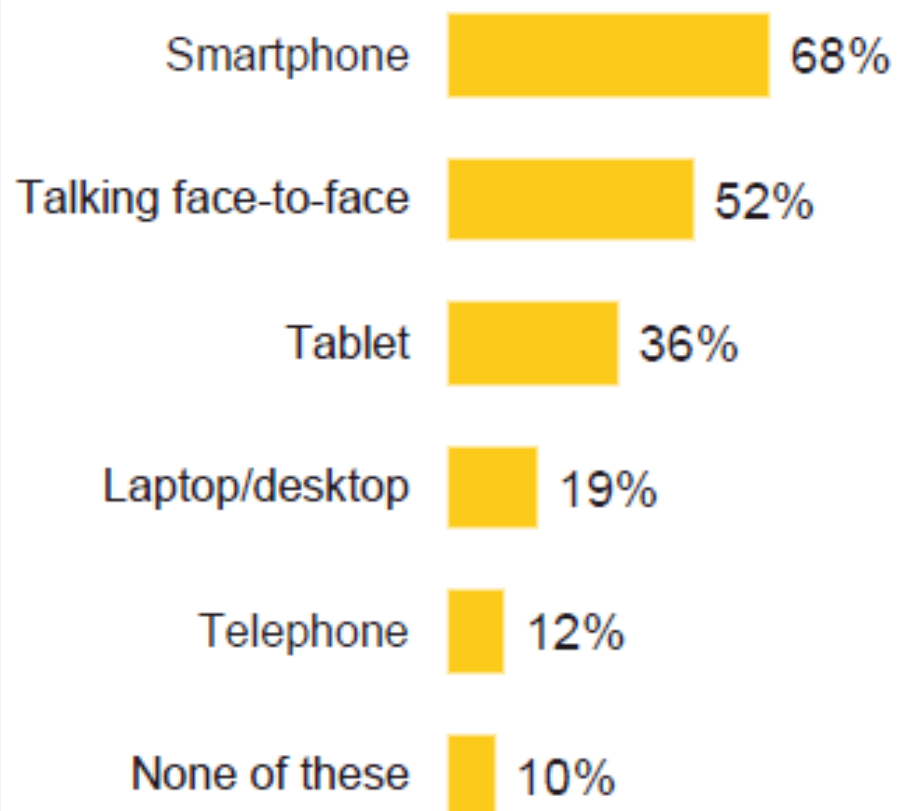
jump
research

SCOTLAND | ALBA

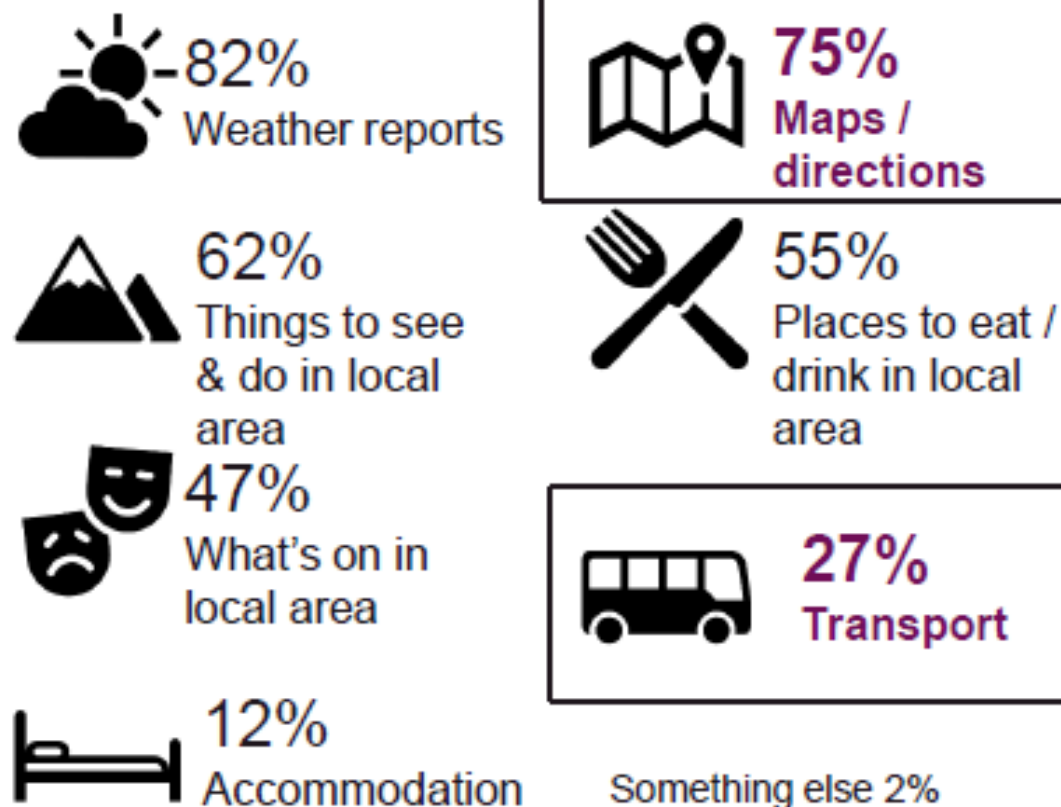
How and What Information Do They Seek While They Are Visiting?

9 in 10 visitors seek information whilst in Scotland, on a range of topics. Using smartphones is the most common approach, followed by seeking in person advice

Used to find out information



Type of information sought



Q39 During your holiday or short break in Scotland, did you use any of the following to find out information relating to your trip while you were in Scotland? Base: S2 All (2999) Q40 What type(s) of information did you look for during your trip? Base: S2 All who looked for information (2781)

Key Transport Takeouts

- 78% of overnight visits are Domestic / 22% of overnight visits are International inbound
- The main methods of transport to Scotland remain car and plane but differences emerge by type of visitor and origin
- For those who arrived in Scotland by plane directly, Edinburgh airport was the main point of entry, followed by Glasgow airport.
- For those who arrived in Scotland indirectly, London Heathrow, Amsterdam Schipol and Dublin airport were the main airports for connecting flights to London
- Multiple transport modes are used once visitors arrive here particularly for 1st time visitors or long haul
- Edinburgh City, Glasgow City and Highlands are the top 3 destinations
- Visitors engage with a broad range of activities however sightseeing, heritage and culture are top.

Challenges to Delivering a “...High Quality, Value for Money and Memorable Customer Experience...”

Fundamentally, how can we make it easy for our visitors to travel between destinations and once they arrive at the destination, make it easy to get around and explore further?

- Reliable and consistent access to remote and more rural destinations to disperse visitors, managing the effects of over-tourism in some areas
- Cruise connectivity – managing the passenger journey from the point of arrival to the point of departure
- Marine tourism infrastructure to accommodate growth
- Airport connectivity – no rail link with Glasgow
- Long term sustainable ferry fleet allowing visitors to explore the islands
- Mobile connectivity / WiFi
- Frictionless, integrated ticketing and timetabling (transport, attractions, accommodation)
- Scotland as a growing cycling destination – cycle routes and the ability to move cyclists around the country
- Supporting our road trips: North Coast 500, North East 250, South West Coastal 300, The Argyll Coastal Route, The Snow Roads, The Coig (Ayrshire) – Facilities, charging points, sign posts, road maintenance
- Increase in campervans / motorhomes – providing facilities
- Sustainability

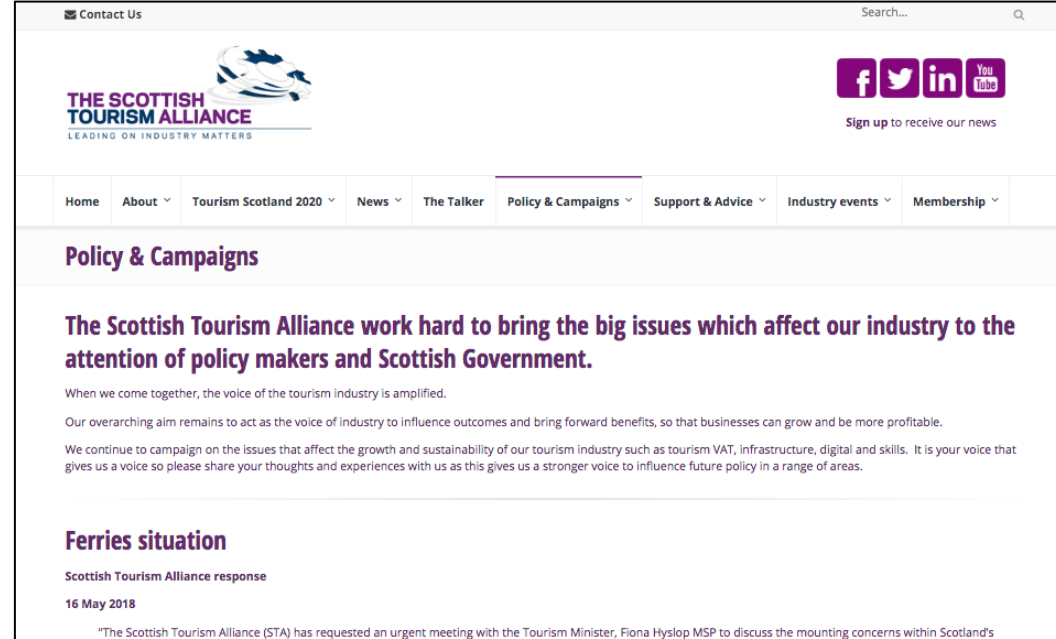
What About the Future?

Considerations

- Visitors are increasingly looking for genuine, authentic experiences where they can feel local and part of the place they are visiting, the ability to explore local neighbourhoods is key to this..
- There is a growing trend towards visitors wanting to discover areas beyond the hot spots, to get out of the towns and cities and off the beaten track to connect with the lesser known areas or the more remote and rural locations
- The traveller is evolving, shift to an older demographic, increase in disabled travellers
- New emerging markets such as China and India, Middle East and South east Asia.
- Geo-tags services, location-based services, virtual reality, augmented reality and social networking services. Can technology improve the customer experience or customer services? Can technology help us to monitor and manage the visitor flow.
- Visitors are much more environmentally aware and will seek out sustainable options. Millennials in particular are committed to creating a positive environmental impact and expect businesses to do the same.



The Talker, the STA's monthly magazine with news and views from Scotland's tourism industry. Subscribe via STA website



Visit the STA website to keep up to date with our progress around these key issues and please sign up to receive our news.

CONNECT WITH THE STA
scottishtourismalliance.co.uk



**SCOTTISH
TOURISM
ALLIANCE**

Your voice in tourism matters



SCOTTISH
TOURISM
ALLIANCE

Your voice in tourism matters

THANK YOU!

scottishtourismalliance.co.uk