

An aerial photograph of a golf course. A river flows through the center, curving around a green. The background features rolling hills and mountains under a blue sky with scattered white clouds. The text 'When you know better, you do better' is overlaid in large white font.

When you know better, you do better

Maya Angelou

SSDA Conference, 19 March 2025

Cat Leaver, VisitScotland

Global drivers of change

A shifting landscape

Cost-of-living

Climate emergency

International competition

Geopolitics

Connectivity

Consumer behaviours

Technology

Cost-of-doing-business

Regulation

Competitive Intelligence

The power of data-driven insight

Meeting Demand

Real-time analytics to track your visitor behaviours

Demand trends

Spending patterns

Identifying & Mitigating Risk

Horizon scanning and benchmarking

Forecasting for economic shift

Environmental changes

Industry disruptions

Maximising Opportunities

Emerging markets

New travel segments

Under-leveraged tourism assets

Global tourism is back

International arrivals reached 98% of 2019 levels in Q1-Q3 2024 and up 11% on 2023

and

Scotland is ahead of the curve

International arrivals to Scotland in Jan-Jun 2024 were 14% up on 2023 levels and 46% up on 2019

but

From staycation to stay-cautious

Trips and spend by GB residents as part of overnight stays in Scotland during the first half of 2024 were down 20% on 2023



Scottish residents



Visits and spend down on 2023 driven by reduced trip taking by Scottish **younger independents** and **families** (~1m trips).

Multi-gen groups and **older independents.**

English residents



Fewer English visitors across all life stages to Scotland in 2024, however an **increase in spend** per trip of 51% for holidaymakers.

Luxury and/or **tailored short breaks.**

North Americans

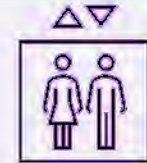


North American visitors continue to **drive growth** of international tourism in Scotland with visits and spend up on 2019.

North American visitors are typically **45+** travelling with **friends** or **family.**

Group and **family travel** tailored to older kids.

Europeans



European visitors to Scotland were at a similar level in 2023 and 2024 (H1). Scotland welcomed over 1M European visitors in the first half of 2024, but spending from these visitors was lower than 2023. Visitors trend to be **younger** and travelling with **children.**

Touring and **family travel** tailored to younger children.

Where are consumers investing their money?

Meaningful experiences

In 2024:

- Almost 9 in 10 people (88%) planned to **spend the same or more** on experiences to 2023.
- 40% of people said experiences provided them with their **best memories**.
- 30% said the found **shared experiences** with others deeply enriching.
- 40% of people **would travel to another country or continent** for an experience they are passionate about.
- **Gen Z** leads the way in planning to spend more on experiences.



Meeting visitor demand

Good for the soul

#1

Natural beauty
is the number 1 driver of global travel

Ipsos NBI 2023

45%

of global consumers are looking for space for relaxation and wellbeing in their next travel destination.

YouGov 2023

42%

of intended Autumn and Winter 2023 trips in Scotland by UK residents was *'to get away from it all and have a rest'*, making it the top motivation.

VisitScotland Domestic Sentiment Tracker 2023

What consumers want

Global visitor drivers



Value

High inflation and rising costs are impacting travel decisions, with visitors seeking out value for money. High-income visitors are most resilient



Authenticity

More visitors are moving beyond the well-beaten tourist trails, seeking out experiences that are genuinely rooted in place and tradition



Convenience

Consumers increasingly expect travel to be seamless, through online bookings and digital tools such as AI and AR



Discovery

Off the beaten path tourism also drives visitors to seek out the unexpected - hidden gem locations and hyper local traditions, foods and customs - and feel that their experience is unique



Wellness

Travel is seen as a chance to escape and refresh, both physically and mentally. Outdoor pursuits, relaxation opportunities and the emotional stimulation of connection to a place are all key. The wellness economy predicted to reach \$9 trillion by 2028



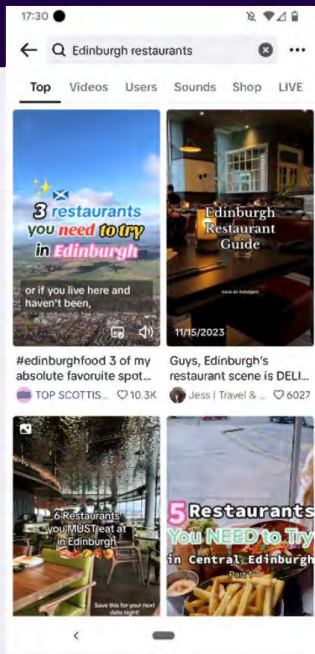
Responsibility

Consumers, especially younger generations, are increasingly conscious of their impact on communities and the environment, and seek for their tourism to do no harm, or actively give back

Maximising opportunities to reach audiences

The evolving digital environment

Social-search



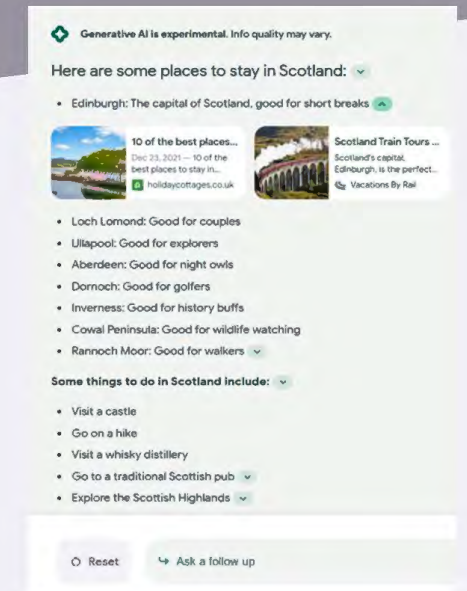
YouTube scale & trends



AI trip-planning



Generative AI in search



VisitScotland Business Support Hub

What to do before buying an online booking system

Browse booking systems

Please make a note of everything you need from a booking system, using our checklist.

- Find out:**
 - Where your current bookings come from
 - What the required effort will be
 - If there are any financial costs such as a commission
 - What each booking costs. Think of staff members involved, time to process each booking, advertising / marketing costs
 - If the cost of bookings will change when people book online
- Carry out thorough research into the options available:**
 - Look at similar business' websites
 - Ask for a quotation

Decide on a booking system

Once you've got a good idea of what's on offer, you can decide which booking system is right for you.

- Contact suppliers**

Speak to each of your shortlisted booking systems and negotiate rates / prices. They may have special offers aimed at businesses in particular areas or for specific business types.
- Have a test drive**

Some suppliers offer free trials which can help ease anxiety and make the switch a bit easier. At first, you may wish to keep things simple with only one or two booking options. For example, don't use any complex packages / multi ticket options until you're more confident with the system.
- Make your decision**

Once you've decided on a booking system, it's always easiest if you change to a new system outside the main visitor season so plan accordingly. Ensure you get the changes to all staff members especially those who will be using the new system. Organise staff training sessions with your selected supplier.

Read the fine print

For sign up process, ensure that you're happy with the supplier terms and conditions. Think about staff like contract renewal, cancellation policy and payment.

Check your system

Check your choice regularly (at least annually) to ensure that:

 - It's getting value for money
 - You're receiving an appropriate level of customer support
 - There are no solutions available more suited to your requirements

Actions to communicate your sustainable business practices

Tourism surveys show that consumer demand for sustainable businesses is increasing each year. This makes your journey to becoming net zero a powerful story to share with your staff, customers, partners, and other stakeholders. The benefits of you telling this story are:

- improving your reputation with customers, the local community, and other business
- attracting new or retaining staff
- reducing the cost of running your business
- attracting new customers

This page will help you assess the ways you share your sustainability journey responsibly, while suggesting good practice for keeping your staff and visitors engaged and informed. Learn more about how to communicate the importance of sustainability and climate action for your business.

In this article:

- [Actions to communicate progress](#)
- [Measure your emissions and record your actions](#)
- [Communication training resources](#)
- [Sustainability training resources](#)

Why sharing your story is important



Improved reputation
Businesses that prioritise sustainability are seen as responsible and ethical.



Customer demand
Sharing your sustainability journey through good content will influence decisions and emotions.



Be inspired by Ballintaggart Farm's journey to create a successful food tourism experience.

Content themes associated with:

Delivering quality experiences

Developing new products

Travel distribution and working with travel trade

Net zero and sustainability

Inclusive tourism

Managing your digital channels

Legislation

Responding to insights and trends

Marketing opportunities

Training and networking opportunities

Events development

Meeting visitor expectations

The path forward

Tourism as a force for good

Data-led

Invest in your data and analytics
Leverage multiple sources
Challenge your thinking
Test and learn

Prioritise sustainable growth

Think long-term
Collaborate
Policies and practices that balance economic, social and environmental impact

Collaboration

Innovative partnerships
Think local
Leverage new technology
Tailor the 'package' to meet demand

A night landscape featuring a calm lake in the foreground, rolling hills in the middle ground, and a clear sky filled with stars and the Milky Way galaxy. The text 'Thank you' is overlaid in large white font on the left side of the image.

Thank you

Cat Leaver

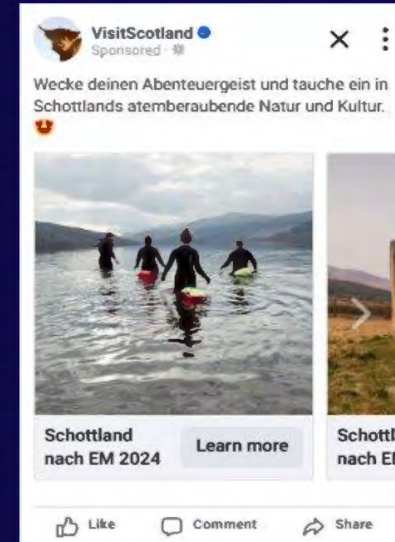
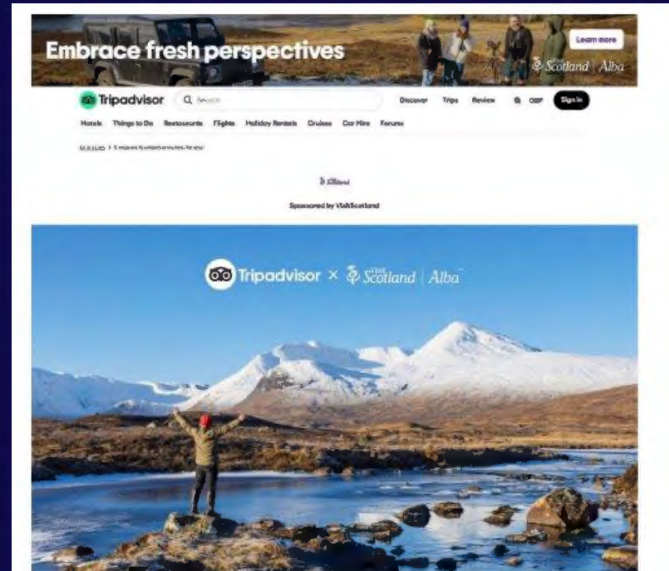
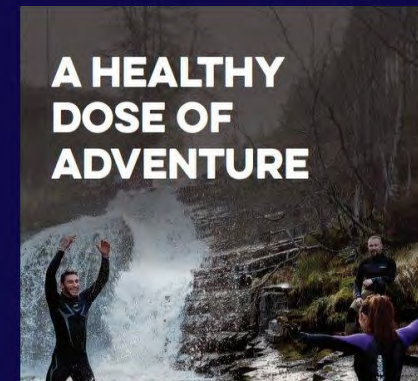
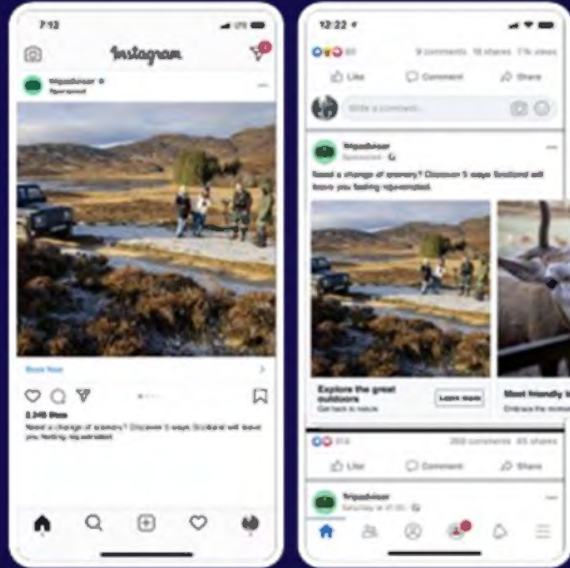
Director of Strategy & Competitive Intelligence

Appendix

Just a small selection of our cross-channel South of Scotland stories and reach

Emotive content

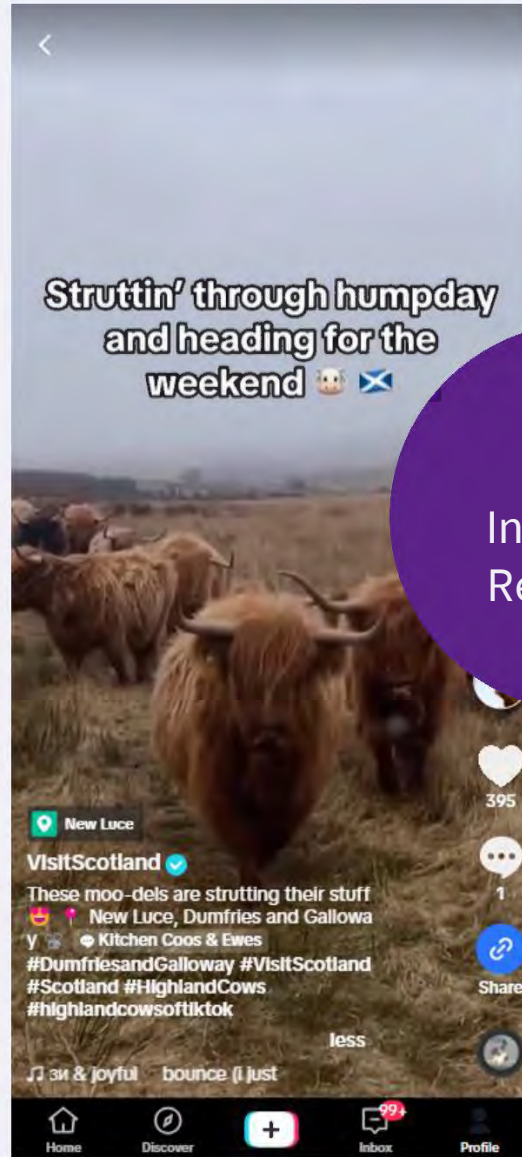
Immersing the user in Scotland at every touch point



Sharing South of Scotland stories - social



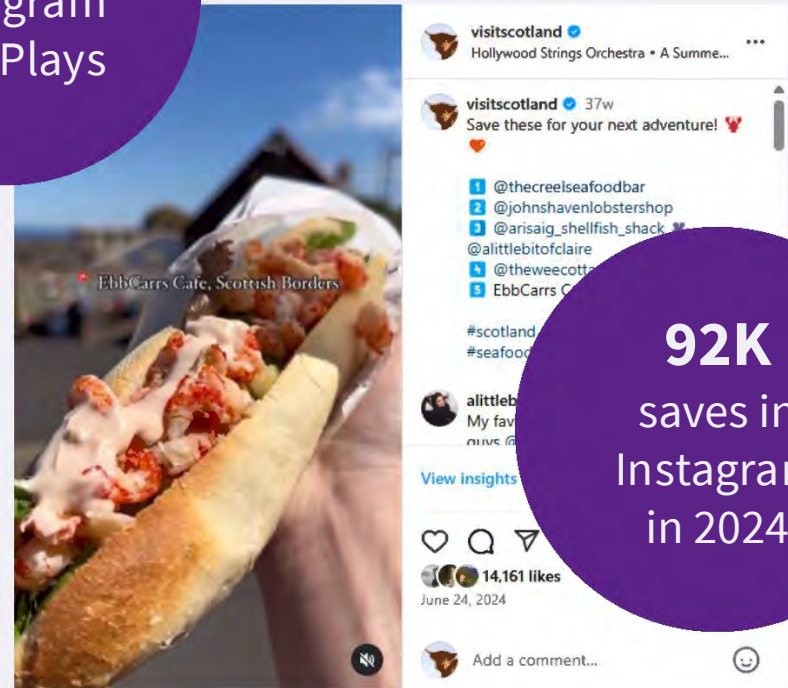
>16M times themed content seen



2.5M Instagram Reel Plays



1.3M social media engagements



92K saves in Instagram in 2024

Sharing South of Scotland stories - PR

The best of the UK for 2025
Tourism experts from the most popular destinations reveal where on their list to **Scotland** *Ordnance Survey*

Whether you're looking for a relaxing holiday or a more adventurous one, the UK has a lot to offer. From the rolling hills of the Cotswolds to the rugged mountains of the Scottish Highlands, there's something for everyone. And now, with the 2025 season just around the corner, it's time to start planning your trip.

Scotland is a top destination for 2025, thanks to its stunning landscapes, rich history, and world-class whisky. From the ancient ruins of Stonehenge to the majestic peaks of Ben Nevis, Scotland offers a truly unforgettable experience.

Key highlights for 2025:

- Whisky Tasting:** Explore the diverse flavours of Scotch whisky, from the smoky peat of the Highlands to the smooth malt of the Lowlands.
- Historic Sites:** Visit iconic landmarks like the Great Wall of Hadrian and the Roman ruins of Hadrian's Wall.
- Nature:** Enjoy the breathtaking views of the Scottish Highlands and the rugged beauty of the Scottish Islands.
- Coastal Drives:** Take in the stunning scenery of the Scottish coast, from the dramatic cliffs of the West Coast to the peaceful bays of the East Coast.

Scotland is a must-visit destination for 2025. With its stunning landscapes, rich history, and world-class whisky, it offers a truly unforgettable experience. Start planning your trip today!

The ultimate guide to stargazing in the UK, including the best holidays
As many as 100 meteors—or 'shooting stars'—will be visible above Britain per hour tonight

Paul Howland
Related Topics: United Kingdom, England, Scotland, Wales, Northern Ireland

Scotland is a top destination for stargazing, thanks to its clear skies and low light pollution. From the rugged mountains of the Highlands to the peaceful bays of the East Coast, there's something for everyone.

Key highlights for 2025:

- Clear Skies:** Enjoy the breathtaking views of the Scottish Highlands and the rugged beauty of the Scottish Islands.
- Historic Sites:** Visit iconic landmarks like the Great Wall of Hadrian and the Roman ruins of Hadrian's Wall.
- Nature:** Enjoy the stunning scenery of the Scottish coast, from the dramatic cliffs of the West Coast to the peaceful bays of the East Coast.

L'Écosse à l'automne : cinq balades dans une nature spectaculaire
Par Assanator Samaké-Roman, pour Le Figaro
Publié le 7 octobre 2024 à 11h00, mis à jour le 7 octobre 2024 à 11h45

Sous le ciel d'automne, l'Écosse se dévoile dans toute sa splendeur. Les paysages sont magnifiques, les couleurs sont incroyables. C'est le moment idéal pour aller en vacances en Écosse.

Key highlights for 2025:

- Autumn Colors:** Enjoy the breathtaking views of the Scottish Highlands and the rugged beauty of the Scottish Islands.
- Historic Sites:** Visit iconic landmarks like the Great Wall of Hadrian and the Roman ruins of Hadrian's Wall.
- Nature:** Enjoy the stunning scenery of the Scottish coast, from the dramatic cliffs of the West Coast to the peaceful bays of the East Coast.

Infos Trailspots
Schottlands Trailcenter sind sensationell, seine **Wanderwege** durchs ganze Land ist ein Optimum.

1 Trossach Valley
Das Trossach Valley ist ein wunderschönes Tal im Norden Schottlands. Die Landschaft ist atemberaubend schön, die Luft ist rein und die Natur ist unberührt.

2 Loch Lomond
Das Loch Lomond ist ein wunderschönes See im Zentrum Schottlands. Die Landschaft ist atemberaubend schön, die Luft ist rein und die Natur ist unberührt.

3 Loch Ness
Das Loch Ness ist ein wunderschöner See im Norden Schottlands. Die Landschaft ist atemberaubend schön, die Luft ist rein und die Natur ist unberührt.

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20 top foodie breaks for autumn
Fancy a seasonal getaway in the UK? We pick new and refurbished pubs, restaurants with rooms and hotels - all with menus as enticing as the views

1 The Old Rectory, North Devon
This charming 17th-century house has been beautifully restored and now offers a truly unforgettable experience. The views are stunning, the food is exceptional, and the service is impeccable.

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Lowlands a highlight
The W Edinburgh, a 244-room hotel that is the first in Scotland for the upscale brand, offers five amazing views of the capital city.

1 The W Edinburgh
This stunning hotel is a true gem in the heart of Edinburgh. It offers a truly unforgettable experience, with its exceptional service, world-class food, and breathtaking views.

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The UK's most scenic road trips
From rugged coastlines to dramatic gorges, these are Britain's most memorable driving routes

1 The North Coast 500
This stunning drive takes you through some of the most beautiful scenery in the UK. From the rugged mountains of the Highlands to the peaceful bays of the East Coast, there's something for everyone.

2 The South West Coast Path
This stunning drive takes you through some of the most beautiful scenery in the UK. From the rugged mountains of the Highlands to the peaceful bays of the East Coast, there's something for everyone.

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The 15 Best Hotels in the World for Stargazing
Sleep under the world's darkest, clearest skies: zones around the world.

1 The 15 Best Hotels in the World for Stargazing
These hotels offer a truly unforgettable experience, with their exceptional service, world-class food, and breathtaking views.

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Inside the secluded Scottish peninsula where Churchill and Eisenhower planned

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269 articles feat. South of Scotland in global publications

99% positive sentiment of coverage

58M+ times South of Scotland themed articles seen