Visit Scotland | Alba

Capitalising on the experience economy to drive growth

Rob Dickson, Director of Industry & Events, VisitScotland

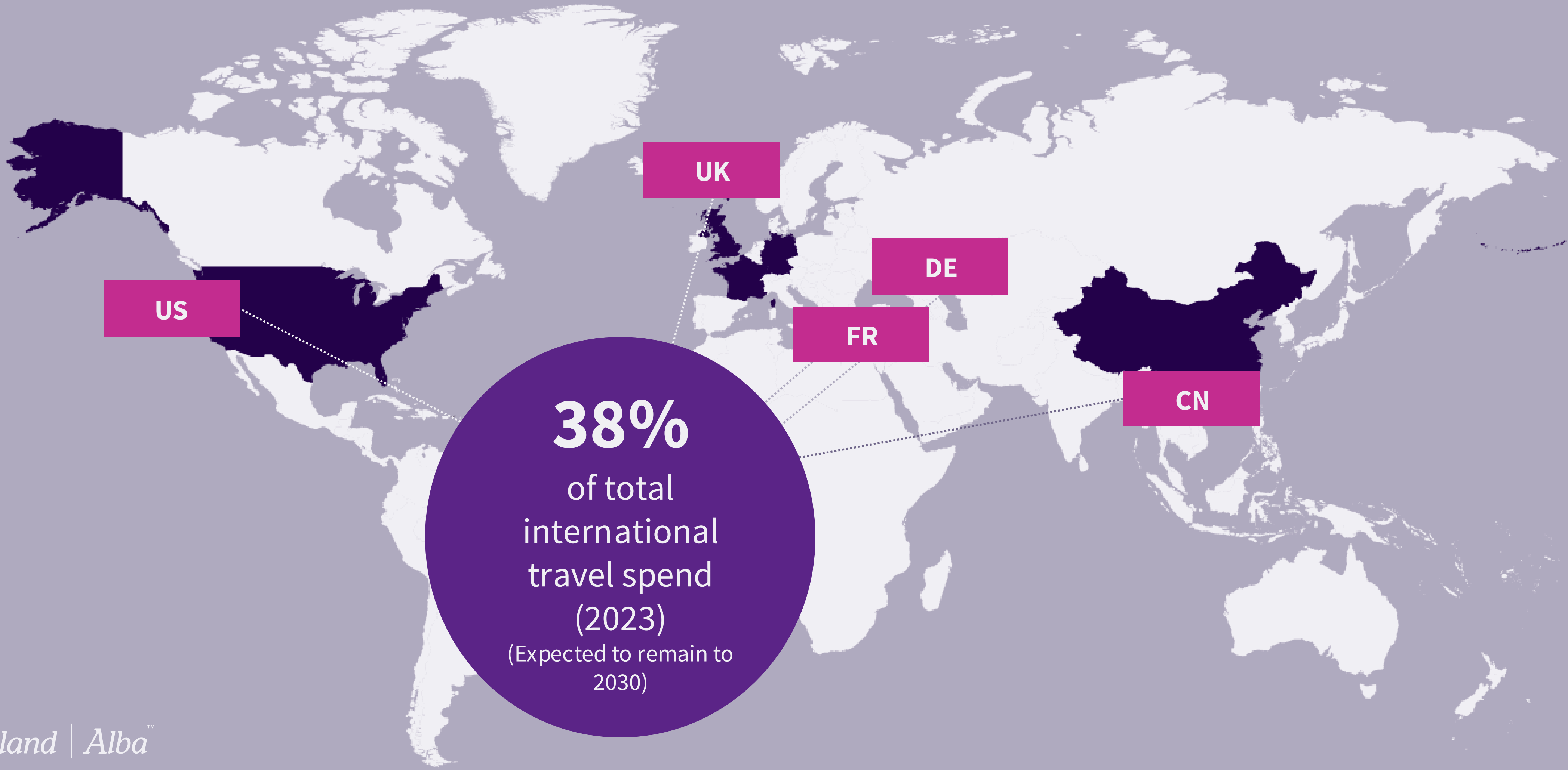
The big picture
Global travel trends

Global drivers of change
A shifting landscape

Cost-of-living	Climate emergency	International competition
Geopolitics	Connectivity	Consumer behaviours
Technology	Cost-of-doing-business	Regulation

Global tourism is back

Top 5 source markets (2023)



Visit Scotland | Alba

Global tourism is back

International arrivals reached 96% of 2019 levels in the first seven months of 2024

and

Scotland is ahead of the curve

International arrivals to Scotland in Jan-Jun 2024 are 46% up on 2019 levels

but

From staycation to stay-cautious

Post-pandemic surge in domestic travel in 2021 and 2022 has not been maintained in 2023 and 2024

Visit Scotland | Alba™

Scotland is ahead of the curve

International Overnight Trips to Scotland 2023 v 2022

- The average duration of trips was **8.6 nights** (up 8% on 2019) with an average **spend per trip of £901** and average **spend per night of £105**.
- Summer (Q3) 2023 had the highest number of trips at **1.4 million**. This quarter also had the highest level of spend (**£1.5 billion**).
- Seasonally, 14% of visits happened in Q1 (Jan – Mar), 29% in Q2 (Apr - Jun), **36% in Q3 (Jul - Sept)**, and 20% in Q4 (Oct - Dec).
- **Holiday** trips made up the largest proportion of overnight trips taken in Scotland in 2023 at **2.5 million**. These trips also made up the highest level of spend (**£2.5 billion**). £643 million was spent on trips visiting friends and relatives, £291 million on business trips.
- International visits had **increased by 15%** compared to 2019. Average length of stay had also increased by 8% to **8.6 nights**.

Source: International Passenger Survey (2023)

From staycation to stay-cautious

Domestic Overnight Trips to Scotland 2023 v 2022

- 11% of all GB trips included an overnight stay in Scotland, with the share of total GB nights and spend at 10%.
- The average duration of trips was **2.9 nights** with an average **spend per trip of £258** and average **spend per night of £90**.
- Summer (Q3) had the highest number of trips at **3.5 million**. This quarter also had the highest level of spend (**£1.0 billion**).
- Seasonally, 23% of visits happened in Q1 (Jan – Mar), 21% in Q2 (Apr - Jun), **29% in Q3** (Jul - Sept), and **27% in Q4 (Oct – Dec)**.
- **Holiday** trips made up the largest proportion of overnight trips taken in Scotland in 2023 at **4.1 million.** These trips also made up the highest level of spend (**£1.3 billion**). £714 million was spent on trips visiting friends and relatives, £661 million on trips for occasions and events.

Source: Great Britain Tourism Survey (2023)

From staycation to stay-cautious
Domestic Day Trips in Scotland 2023 v 2022

- **8%** of all GB tourism day visits included a visit in Scotland, with the share of total GB spend at **8%**.
- **Summer** (Q3 Jul - Sep) 2023 had the highest number of tourism day **visits** at **30.6 million**.
- Seasonally, 22% of day trips happened in Q1 (Jan – Mar), 23% in Q2 (Apr - Jun), **33% in Q3** (Jul - Sept), and 22% in Q4 (Oct – Dec).
- **Autumn** (Q4 Oct - Dec) 2023 had the highest level of tourism day visit **spend** at **£1.0 billion.**
- Visits to **cities** or **towns** made up the largest proportion of tourism day trips taken in Scotland in 2023 at **9.8 million**. These trips also made up the highest level of spend (**£785 million**).

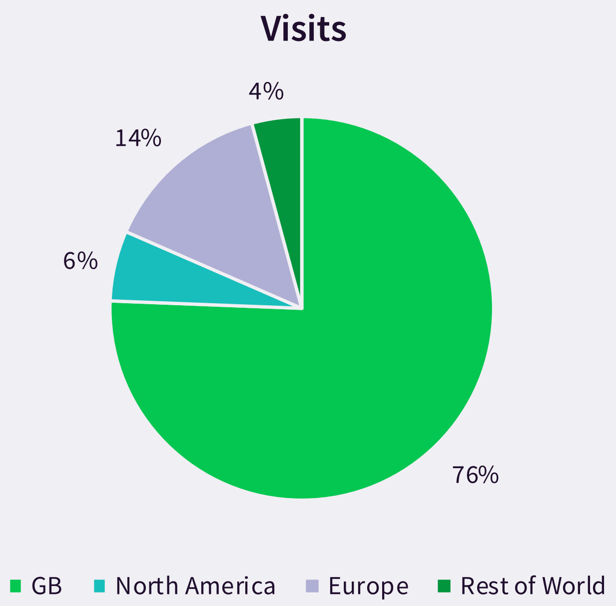
Source: Great Britain Tourism Survey (2023)

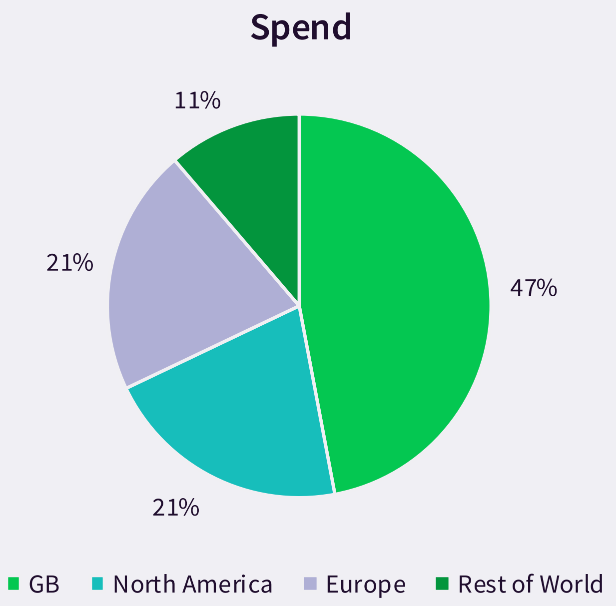
Who visited Scotland in 2023?

All overnight visits to Scotland

- Domestic (GB) visits made up just over three quarters of the overall visits in 2023 (76%).
- European visits were the second most popular (14%), followed by North America (6%) and Rest of World (4%).

- Overall spend was also highest from the domestic (GB) visits at 47% of the total spend.
- Total international spend overtook domestic spend for the first time.
- European and North American visits each accounted for 21% of the total spend, while Rest of World was responsible for 11%.





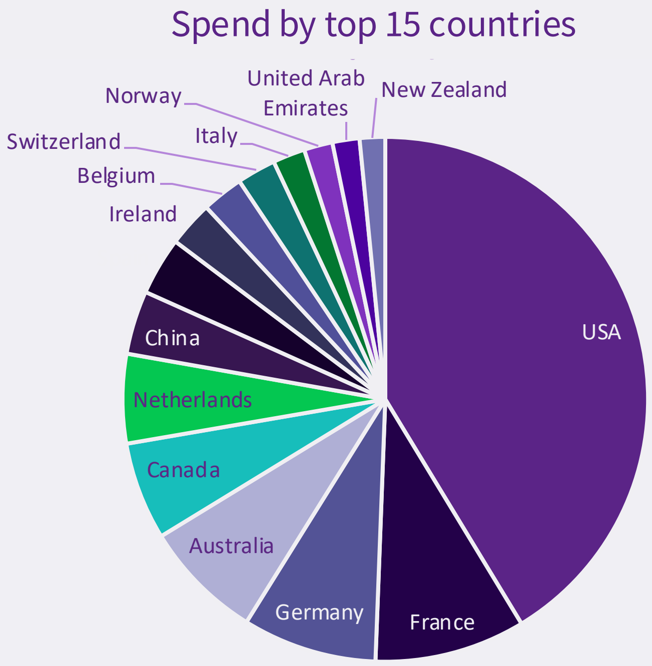
Source: International Passenger Survey 2023 – All visits

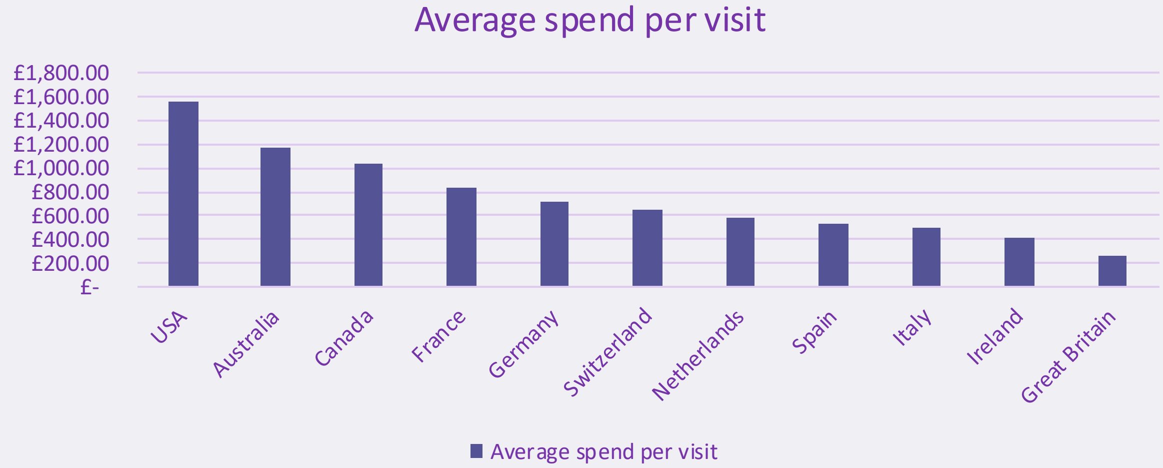
Who visited Scotland in 2023?

International visitors

- The top 15 international markets by spend were responsible for **83% of the total** international spend in Scotland.
- The **USA** was the **highest spending** by far, with 34% of the international spend, followed by France at 8% and Germany at 7%.
- The **USA** also tops the list in terms of **average spend per visit**, at £1,557 per visit, followed by Australia (£1,169) and Canada (£1,032).
- Domestic (GB) visitors spend significantly less at £258, primarily due to shorter trips and fewer associated costs in areas such as accommodation and travel.

Source: International Passenger Survey 2023 – All visits





*Top 10 international markets and GB by number of visits to Scotland

Who is coming to Scotland?

2/3 of visitors to Scotland travel with their **partner** or **spouse**; the top travel party across all markets

Scottish residents are more likely to travel with **family** than the rest of the UK

Younger visitors are a growth market for **Scottish domestic** tourism, representing over **1/3** of overnight trips in 2023

North American visitors are more likely to be **aged 45+** and travelling with a wider **family group** or **friends**

Short haul visitors tend to be **younger** and are more likely to be travelling with their **children**

Scotland Visitor Survey 2023, Great Britain Tourism Survey 2023, International Passenger Survey 2023

What’s changing?
Consumer trends

What do visitors want?
Global consumer drivers

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

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

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.

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

Discovery (De-tour destinations)
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.

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.

Changing economic value

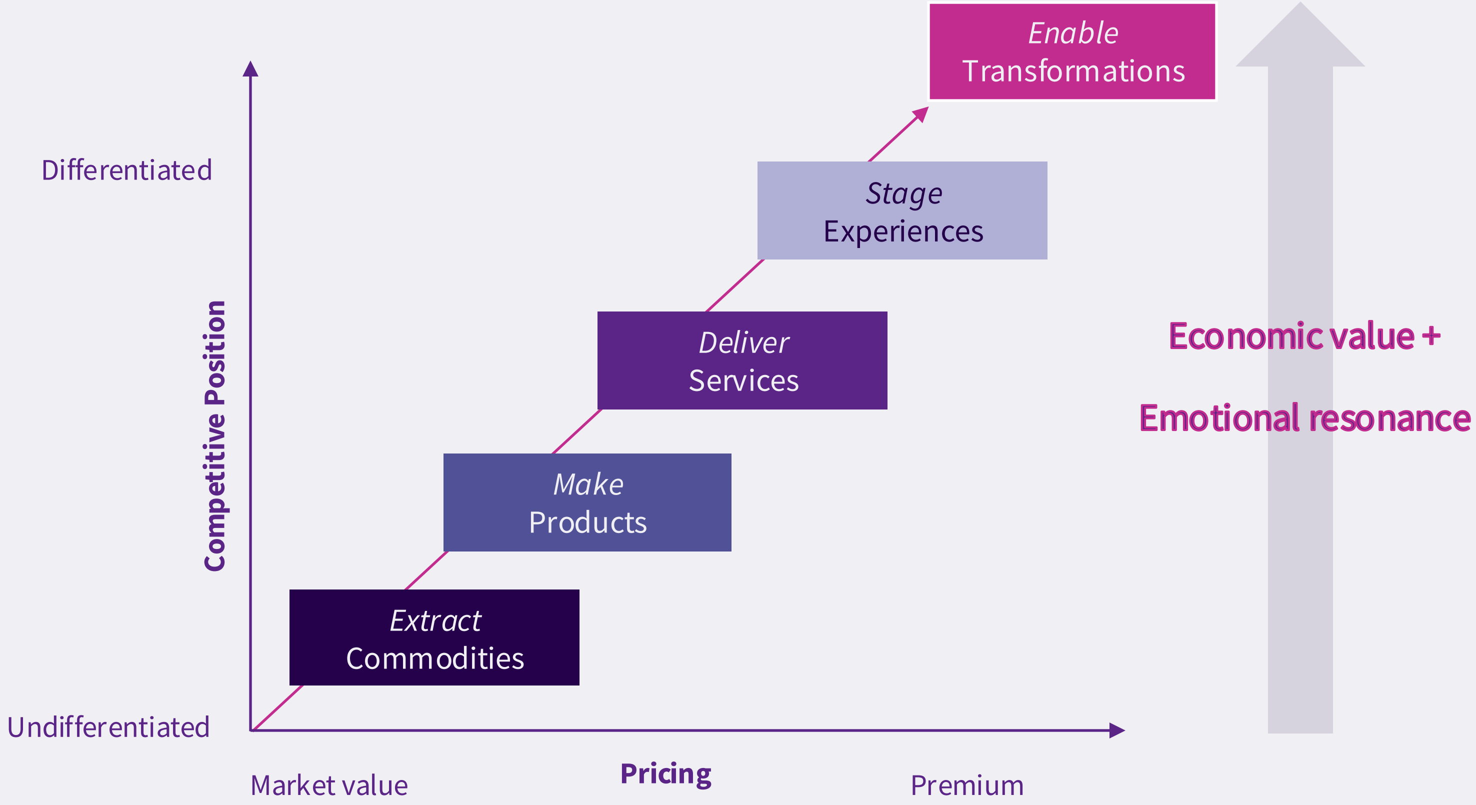
What do consumers want?

Over centuries, we've developed through:

- Extracting and moving **raw materials** to
- Making goods and **products** to
- Delivering **services** to
- Staging **experiences**

What's next?

- Enabling **transformations**
- JOMO (Joy of missing out)



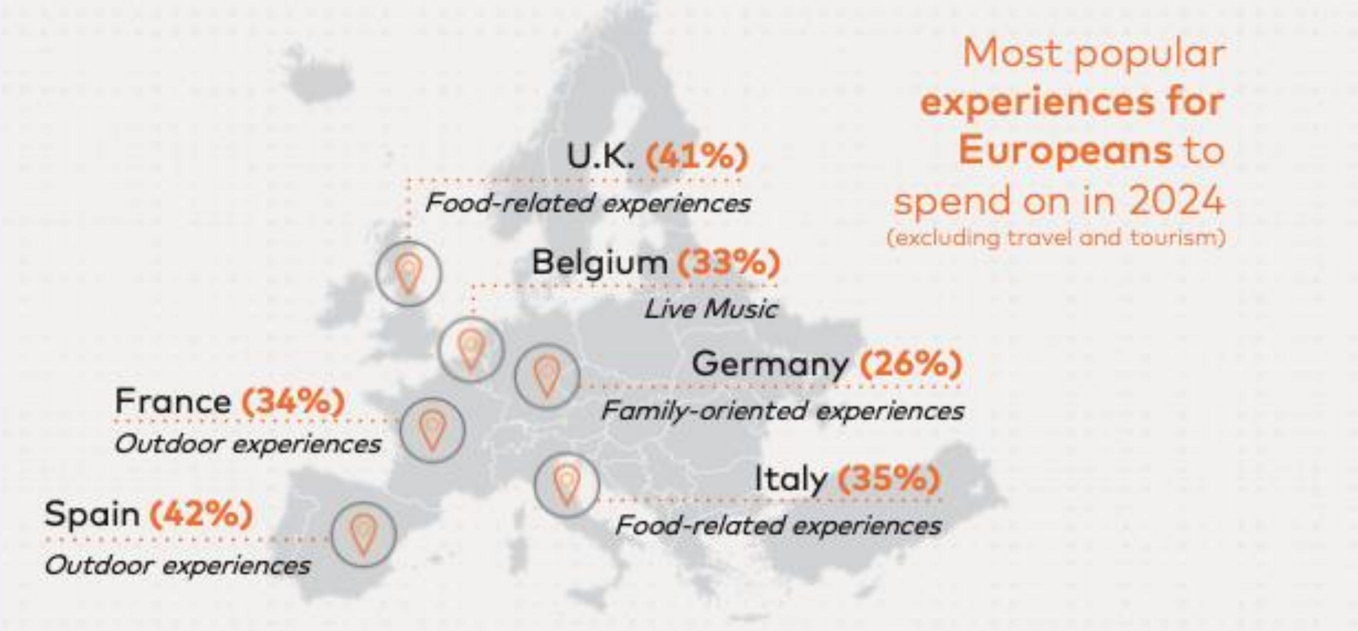
Source: Pine & Gilmore 1999; Schänzel 2019

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 continen**t for an experience they are passionate about.
- **Gen Z** leads the way in planning to spend more on experiences through 2024.



Source: [MasterCard Experience Economy Survey 2024]

Who cares?

Value generation - a global example

Gig tripping: **Swiftonomics**

- 1.2 million fans attending the Eras Tour predicted to spend an average £848 each (tickets, travel, accommodation, outfits, expenses)
- 12 x the average cost of a UK night out
- 2 x average spend of attending UK-based wedding

This mindset reflects a wider shift towards the experience economy – where consumers prioritise spending on events and experiences over goods.

The future of tourism takes us from ‘visit and see’ to ‘experience, develop and remember’.

Source: Barclays, 2024

What does it mean for Scotland?

A key enabler for **sustainable** tourism

- Increased visitor spend – immersive meaningful experiences drive longer stays, higher and repeat spend
- Seasonal spread – diverse portfolio of experiences tailored to drive year-round visitation
- Sustainable growth – meaningful connections with communities delivering greater loyalty, premium rates and returns

Source: Barclays, 2024

Our changing consumer

The experience and transformation seeker

Be cautious with consumer profiles and the interpretation of data:

King Charles	Male Born 1948 White Raised in UK Married twice Multiple children High disposable income High value assets (own a castle)	Ozzy Osbourne

Our visitors:

- Globally diverse and diverse in demographics
- Value sustainability, cultural authenticity, unique experiences, emotional connection, wellbeing and enriching experiences

A competitive advantage

Scotland’s key transformation economy opportunities

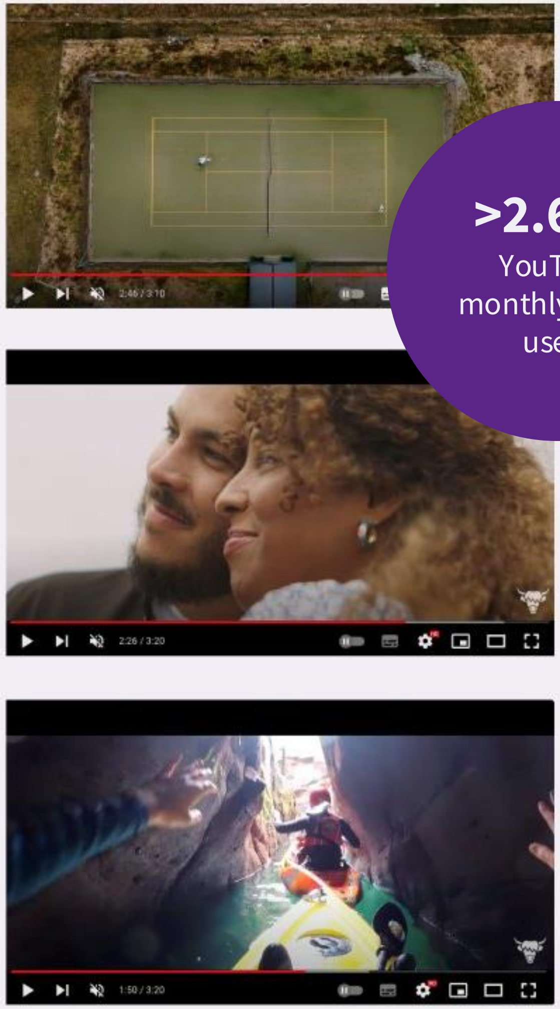
- Wellbeing tourism – outdoor, wellness, connection
- Heritage and history – immersive storytelling, cultural connections, workshops and authentic crafts
- Food and drink – local provenance, farm to fork
- Outdoor adventures – wildlife and nature, coasts and waters, hills and peaks, water activities, cycling and walking
- Arts and festivals – traditional (i.e. Highland Games) to the contemporary (i.e. Edinburgh Fringe), ceilidhs and trad music, food and drink
- Volunteering and conservation – environmental restoration and conservation, rewilding, learning experiences

Developing deeply enriching experiences

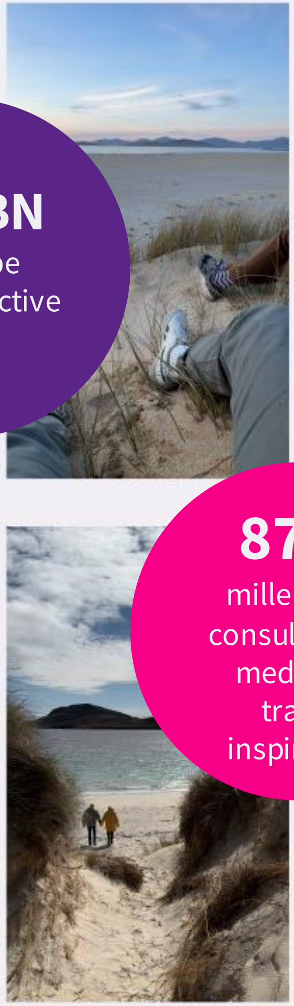
Leveraging local expertise, partners & communities to show the true spirit of Scotland

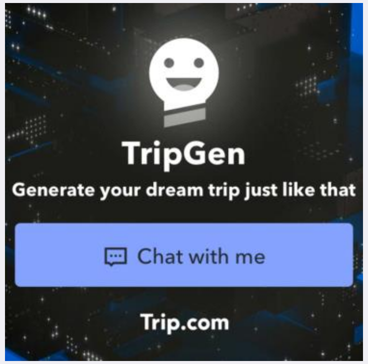
An evolution in search

How consumers find information is changing

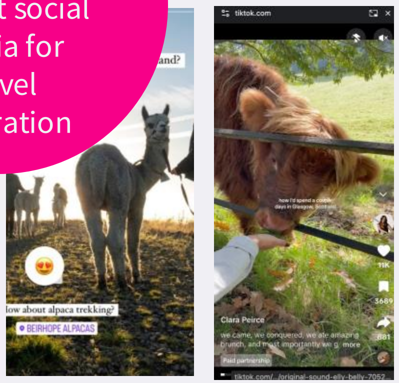


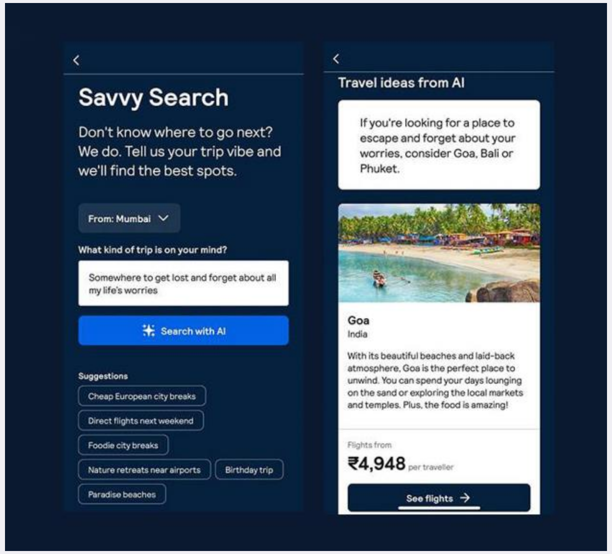
>2.6BN
YouTube monthly active users





87%
millennials consult social media for travel inspiration





VisitScotland | Alba™

How are visitors booking?

Booking activities and experiences in Scotland

UK visitors

- **29%** booked in **advance**.
- The vast majority did so **direct** with the activity or experience providers.
- **8%** used a type of travel **intermediary**.

European visitors

- **44%** booked in **advance**.
- The majority of these booked **direct** with the provider (**78%**).
- **23%** used a type of travel **intermediary**.

Long haul visitors

- **63%** booked in **advance**.
- Amongst these, **over 70%** booked **direct** with the provider.
- Long haul visitors were more likely than those from the UK or Europe to book via a travel **intermediary** (**45**%).

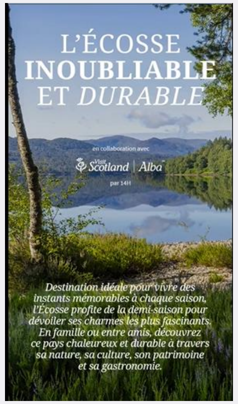
Q14 (Stage 2): Did you book any paid activities or experiences in Scotland in advance of your short break or holiday? – Base (all Europe): 625
Q15 (Stage 2): How did you book your activities or experiences within Scotland before your trip? – Base (those who booked activities): 266

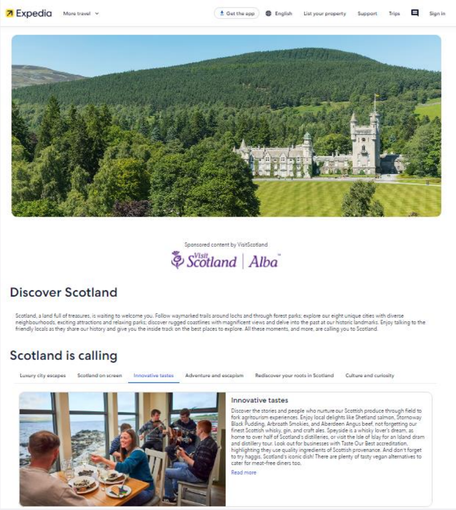
Note: this question is a multiple-choice question, therefore respondents may have selected multiple channels, leading to the cumulative percentage exceeding 100%.

Storytelling

Leveraging compelling narratives to showcase experiences

- Delivered through content marketing in the form of digital storytelling, including videos, articles, and social media content.
- Leveraging PR to secure quality editorial coverage in targeted global titles.
- Amplified through targeted media partnerships, including Expedia, Skyscanner, TripAdvisor, NatGeo, Hearst, Culture Trip & Le Figaro.





Storytelling

Leveraging compelling narratives to showcase experiences

Using content creators and influencer partnerships to support visitor attractions by:

- Showcasing first-hand, authentic experiences
- Creating inspiring assets
- Leveraging the influencer's passions and interests to maximise credibility
- Getting in front of curated audiences VisitScotland doesn't have access to

Instagram Reel showcasing a family trip to Dundee including visiting/tagging the V&A and Discovery.

94K video plays

27K video plays

Instagram Reel promoting Inverness Museum & Art Gallery, showcasing it as part of a wider city break experience.

19K post impressions

Instagram carousel showcasing a visit to Lauriston Castle.

VisitScotland | Alba

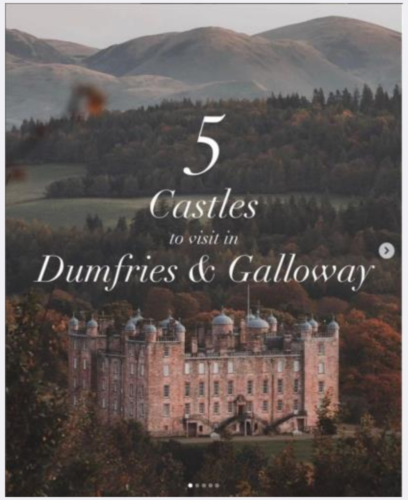
Supporting local businesses and partners

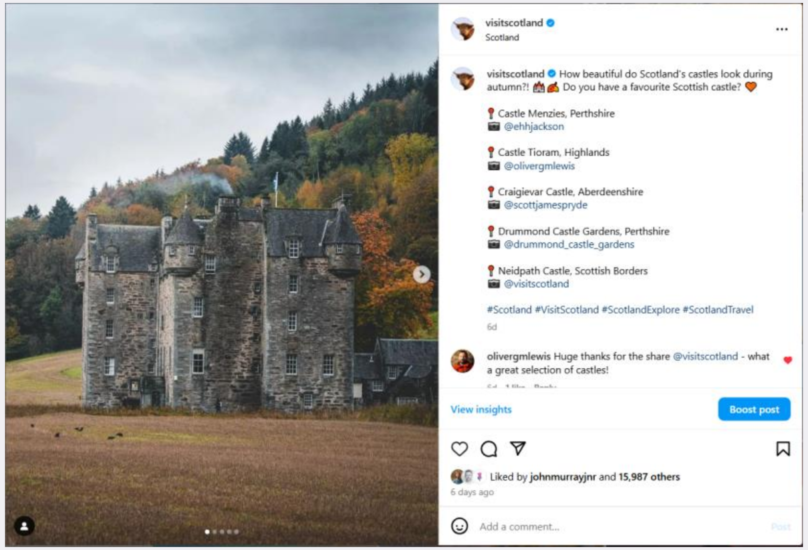
Curating Scotland's unique, authentic experiences

Sharing user-generated content to amplify authentic visitor stories and advocacy.

Promoting local businesses and partners by -

- directly @ mentioning the attraction and using their hashtags
- using Instagram Stories to tag businesses in an interactive way
- driving traffic directly from VisitScotland channels to businesses, aiding social discoverability
- featuring bookable experiences in a saveable format, indicating a users future intent to revisit the content for planning and consideration





In conclusion…

Scotland as a leader in the transformation economy

Imagine a Scotland known not just for its sights, but for its impact. Visitors come to Scotland seeking not just a break from the norm, but a chance to deepen their understanding of themselves and the world around them. As a leader in the transformation economy, Scotland can attract those who want to grow through travel, connecting with others, and reconnecting with nature.

This is a vision that ensures Scotland's relevance and appeal to future generations of visitors, building lasting relationships that go far beyond a single trip; and ensures we collectively face into the challenges of climate change and managing for visitors, to ensure tourism truly is a force for good.

VisitScotland | Alba™

Thank you

Any questions?

ASVA Conference

Vicki Miller Chief Executive, VisitScotland