



*Visit
Scotland* | *Alba*TM

**TOURISM GATHERING
MARCH 2025**

Global tourism is back

International arrivals reached 98% of 2019 levels, and up 11% on 2023

and

Scotland is ahead of the curve

International arrivals to Scotland 14% up on 2023, and 46% up on 2019. Spend up 30% in real terms

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

Recovery from older independents is an opportunity.

English residents



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

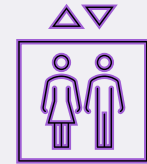
North Americans



North American visitors continue to drive growth of international tourism in Scotland with visits and spend up 30% on 2019.

Visitors are typically 45+ travelling with friends or family.

Europeans



European visitors to Scotland were at a similar level in 2023 and 2024, but spend was lower than 2023.

Visitors trend to be younger and travelling with children.

Global drivers of change

A shifting landscape

Cost-of-living

Climate emergency

International competition

Geopolitics

Connectivity

Consumer behaviours

Technology

Cost-of-doing-business

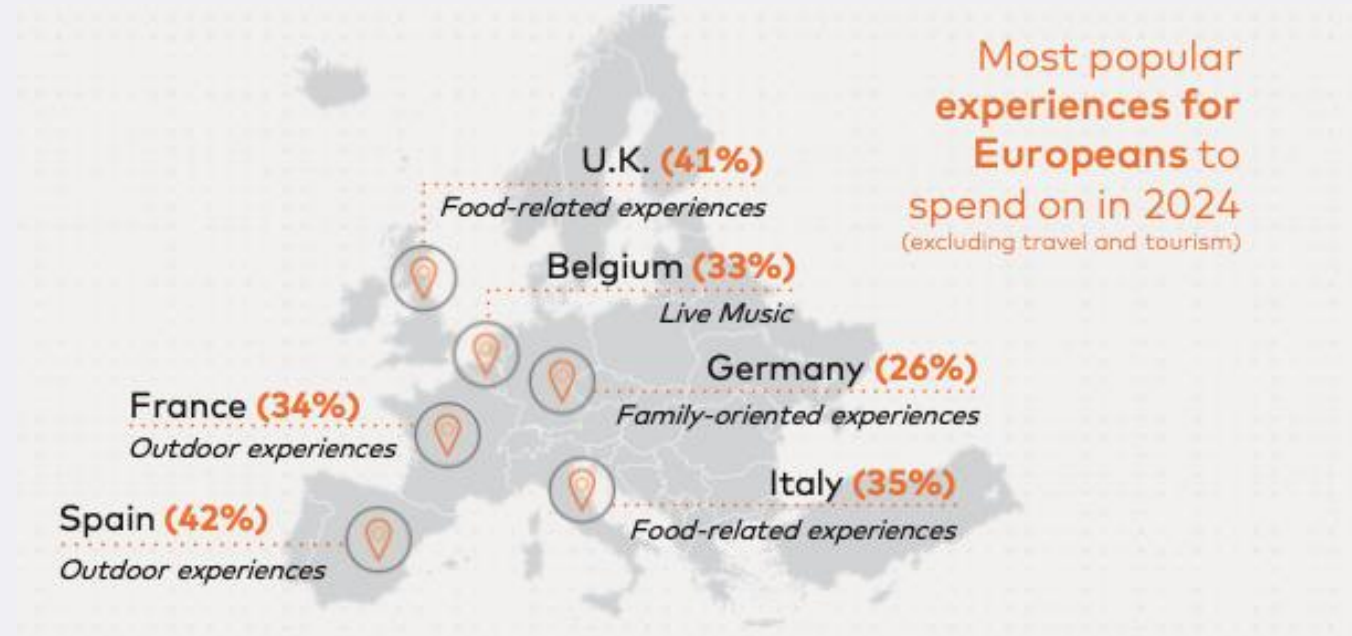
Regulation

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 they 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.



Trends for 2025: The Experience Economy

- Macro trends
- Worldwide tourism opportunities
- Fit with Scottish product and markets
- Opportunities for businesses

[Consumer Trends For Scotland | VisitScotland.org](https://www.visitScotland.org)

1. Trends for 2025: the experience economy

The experience economy and experiential tourism reflect a growing desire from visitors to spend time and money on meaningful experiences that create lasting memories.

In this trends paper, we explore:

- eight key trends shaping what visitors are looking for in 2025
- how tourism and events businesses in Scotland can capitalise on these trends in the coming year

The growing experience economy is underlined by the two key themes seen across travel, "passion travel" and "wellness tourism".



Trends for 2025: the experience economy
Published January 2025

Download (6Mb)



Key trends for 2025



Gig tripping

Planning trips around events such as concerts and festivals.



Hobbidays

Visitors choosing destinations based on places that promote and facilitate their favourite hobbies.



Set-jetting

Visitors choosing to visit the "set" of their favourite Scotland-based film or TV show.



Instant inspo

Combining the use of social media platforms for pursuing passions and planning / booking trips.



Celebreactions

The opportunity for an existing celebration or milestone to be transformed into a holiday.



Snoorie

Combining snooze and coorie, "snoorie" describes tourism promoting rest for visitors.



Biohacking wellness

Incorporation of "biohacking" technology in tourism to appeal to certain wellness seeking visitors.



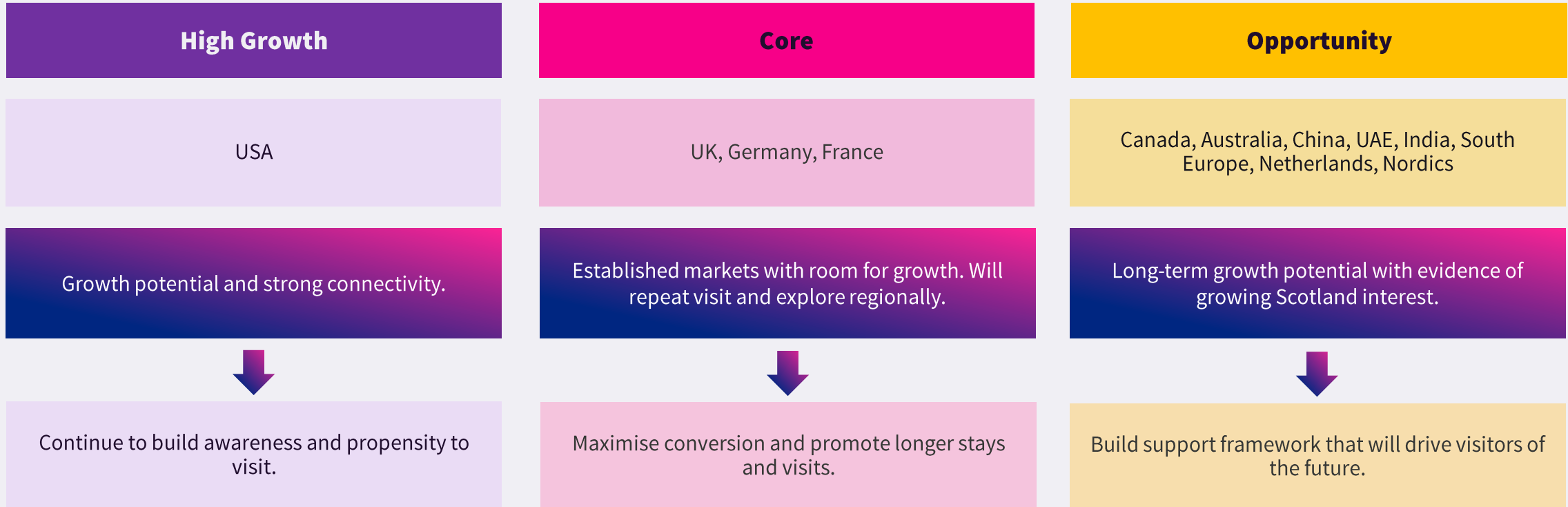
Outdoor therapy

Using Scotland's unique outdoors to promote wellness, such as outdoor saunas and forest bathing.

MARKETING FOCUS

Market Development

Investing to maximise impact



B2C: Destination brand building; Paid media campaign delivery.

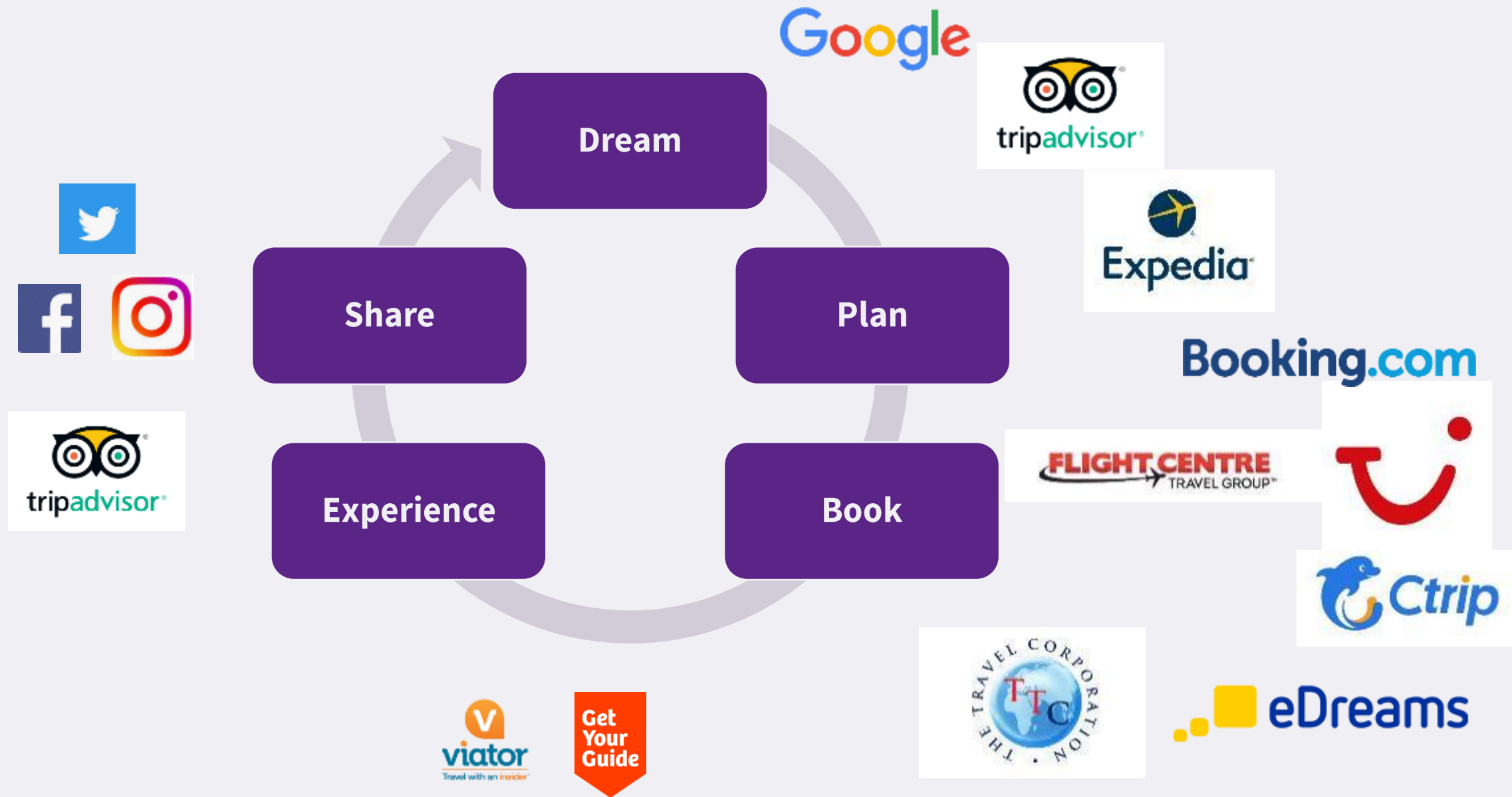
B2C: Always-on storytelling connecting narrative to industry product; Amplification via PR & social led strategy.

B2B: Increase Scotland tour programmes and itineraries offered by tour operators, travel advisors and airline/ferry vacation arms (intermediary relationships).

B2B: Influence airlines to increase direct connectivity to Scotland for long haul – extend season to year-round; Influence train / ferry offering (for Europe / UK visitors).

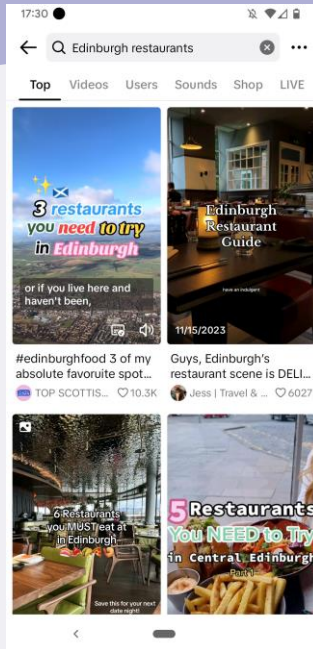
Working in Partnership





The evolving digital environment

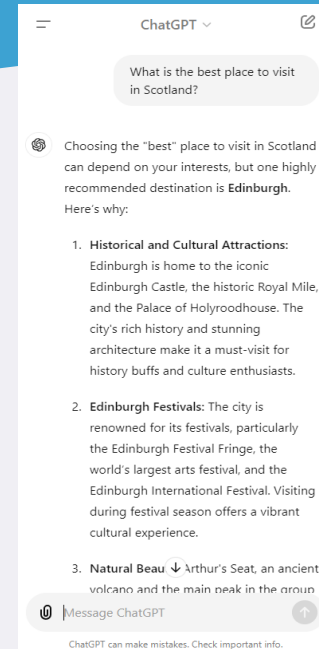
Social-search



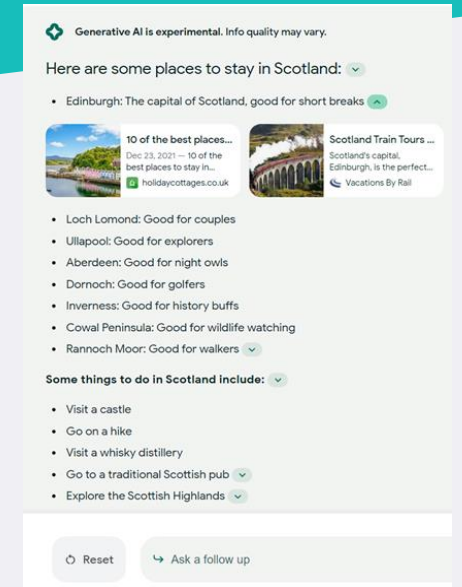
YouTube scale & trends



AI trip-planning



Generative AI in search

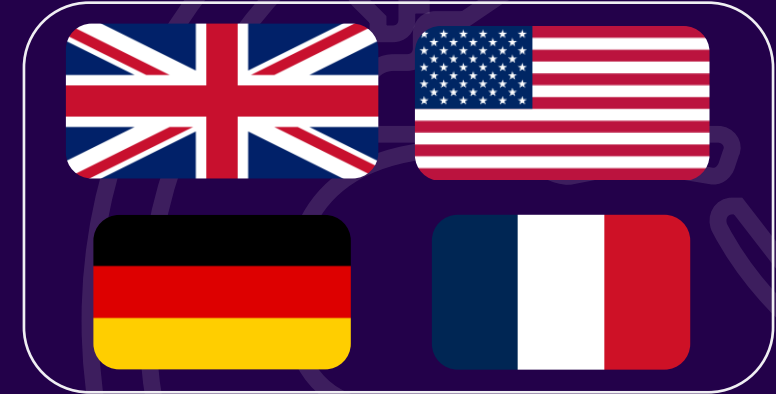


Continuing to build our global reach & scale

17 active markets worldwide

- **560M** Global PR impressions from **2400** Scotland articles (2024-25); **2000+** unique relationships with influential tier 1 media; in-person media meetings in 7 markets; 125 pitching bundles delivering effective engagement with global consumer & trade media; 206 media visits promoting seasonal & regional spread, growing destination knowledge & responsible advocacy
- **172M** times people were reached on organic social channels
- **+8M** people use visitscotland.com annually. Content in 6 languages.
- **28M** consumer emails sent by VisitScotland annually
- **7,000** meetings between suppliers and businesses to support internationalisation. £9m value delivered to businesses through Connect. (2024/25)
- **£6.7M** value of business event delegates extended stay post-association conference attendance

Core & Growth Markets



Opportunity Markets

Sharing Caithness & Sutherland stories



visitscotland

Scotland

visitscotland

3 w

When snowdrops appear, you know springtime is near! 🌸 Have YOU spotted these bonnie wee flowers dotting our landscapes? 🌸🌸

Dunrobin Castle, Sutherland

@dunrobin_castle

Dunstaffnage Castle, Argyll

@philmcintoshphotography

Smeaton Arboretum, East Lothian

@hiking.bairn

Floors Castle, Scottish Borders

@visitkelso

View Insights

Boost Post

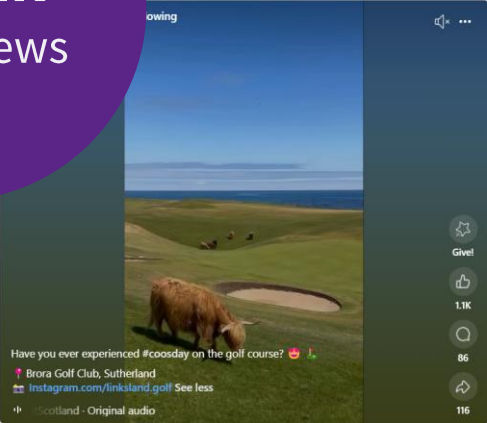
👍👤

16,425 likes

23 February

Add a comment...

326.1k
Video views



visitscotland

Hannah Rarity • Scotland Yet

visitscotland

3 w

Scotland's coastlines are truly a sight to behold 🌊 What an atmosphere here at Duncansby Head, the most northerly easterly point of the British mainland 🇬🇧🌊

Duncansby Head, @ve

@danchristie_24

#Scotland #VisitScotland

#ScotlandExplore #Scotland

sebastian.grafe

3 w

Amazing and calming view

1 like

Reply

View Insights

Boost Post

👍👤

10,466 likes

22 February

Add a comment...

13.6K
shares

>11.1M
times
content in this
region seen

VisitScotland

is at The Flow Country.

September 1, 2024

Bringing you this bonnie snap of #Scotland's newest #UNESCO World Heritage Site! 🌿 This large area of peat bog covers much of Caithness and Sutherland in the Highlands ... See more

👍👤

664

8 comments

24 shares



visitscotland

visitscotland

1 w

An iconic Scottish scene brought to your screen from the Highlands! 🏴󠁧󠁢󠁥󠁮󠁧󠁿 Happy #Coosday Tuesday 🐮🌿

@scotland_with_alex

#Scotland #VisitScotland

#ScotlandExplore #HighlandCow

scotland_with_alex

1 w

Thanks a lot for sharing @visitscotland 🐮

Reply

View all 1 replies

View Insights

Boost Post

👍👤

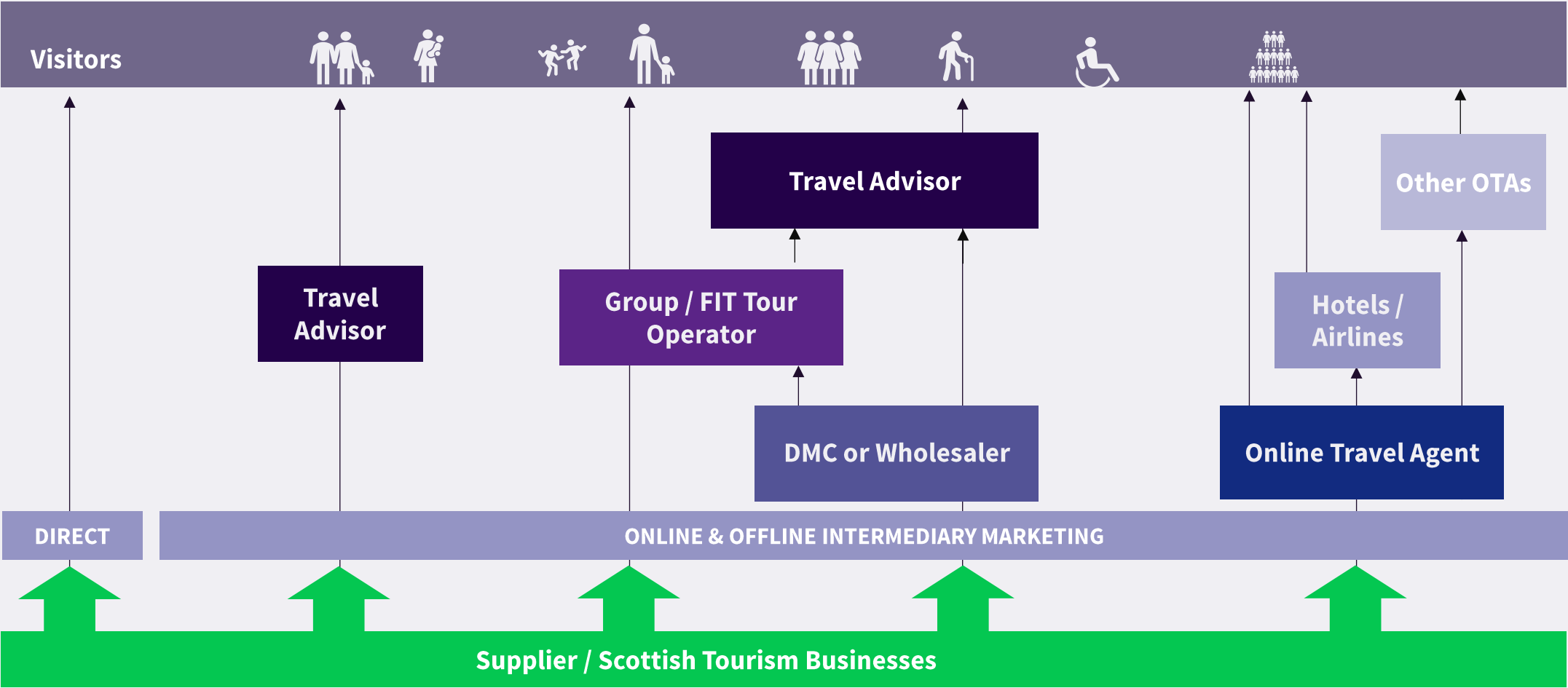
10,536 likes

4 March

Add a comment...

706.3k
Social media
engagements

Selecting your routes to market



VisitScotland Business Support Hub

Objectives:

- Make it easier for businesses to find useful and relevant information that can inform their planning
- Keep it updated with timely actionable insight
- Build stronger connections with key industry partners and signpost to their resources
- Enhance business competitiveness and growth
- Supported by workshops & webinar programme

Beta site now live

Let us know what you think | Join the user panel

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

Working with us to take Scotland to the trade



Learning Platforms & Meet-the- trade Events

Our 2025-26 training and event calendar will be published soon on visitscotland.org



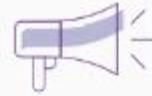
Start your business →

Essential tools to help you launch successfully including pricing strategies and legislation advice.



Improve your business →

Deliver quality experiences with customer insights, accessibility and service excellence.



Promote your business →

Boost visibility through engaging content, social media and marketing partnerships.



Grow your business →

Develop new products, secure funding and expand with expert advice.



Sustainability →

Sustainably grow your tourism or events business with actionable green strategies.



Support by sector →

Find tailored advice and case studies for accommodation, active and outdoor, events and festivals, food and drink and visitor attraction sectors.

- Bitesize learning webinars & new Business Support Hub content
- Development programme
 - Product Development workshops
 - Preparing your Product Pitch
- Scottish-based & global events
 - Product Presentation Day
 - Business Development Mission – London / Canada / China
 - VisitScotland Connect / ITB / ETOA Global Marketplace / WTM

Useful Information

Market & Consumer Insights:

[International Visitors | VisitScotland.org](https://www.visitScotland.org)

[Our international tourism markets | VisitScotland.org](https://www.visitScotland.org)

[Visitors from the UK | VisitScotland.org](https://www.visitScotland.org)

Supporting your business:

[Travel Distribution Jargon Buster | VisitScotland.org](https://www.visitScotland.org)

[How to Work with the Travel Trade | VisitScotland.org](https://www.visitScotland.org)

[Improving Your Digital Skills | VisitScotland.org](https://www.visitScotland.org)

[Get to Know and Learn From Your Customers | VisitScotland.org](https://www.visitScotland.org)

[How To Define Your Target Market | VisitScotland.org](https://www.visitScotland.org)



Thanks

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