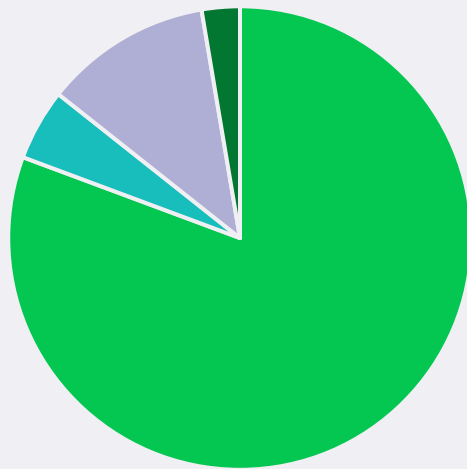


VisitScotland Update

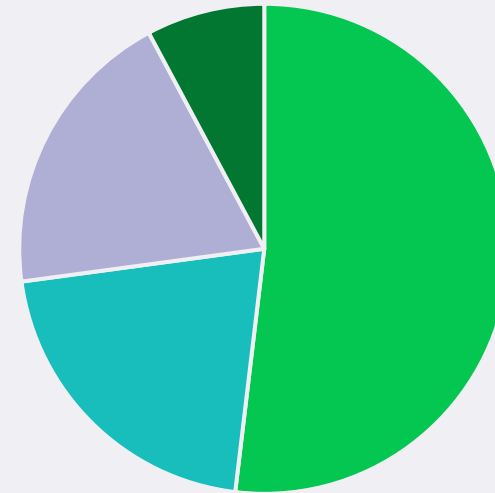
Who visited Scotland in 2022

Visits



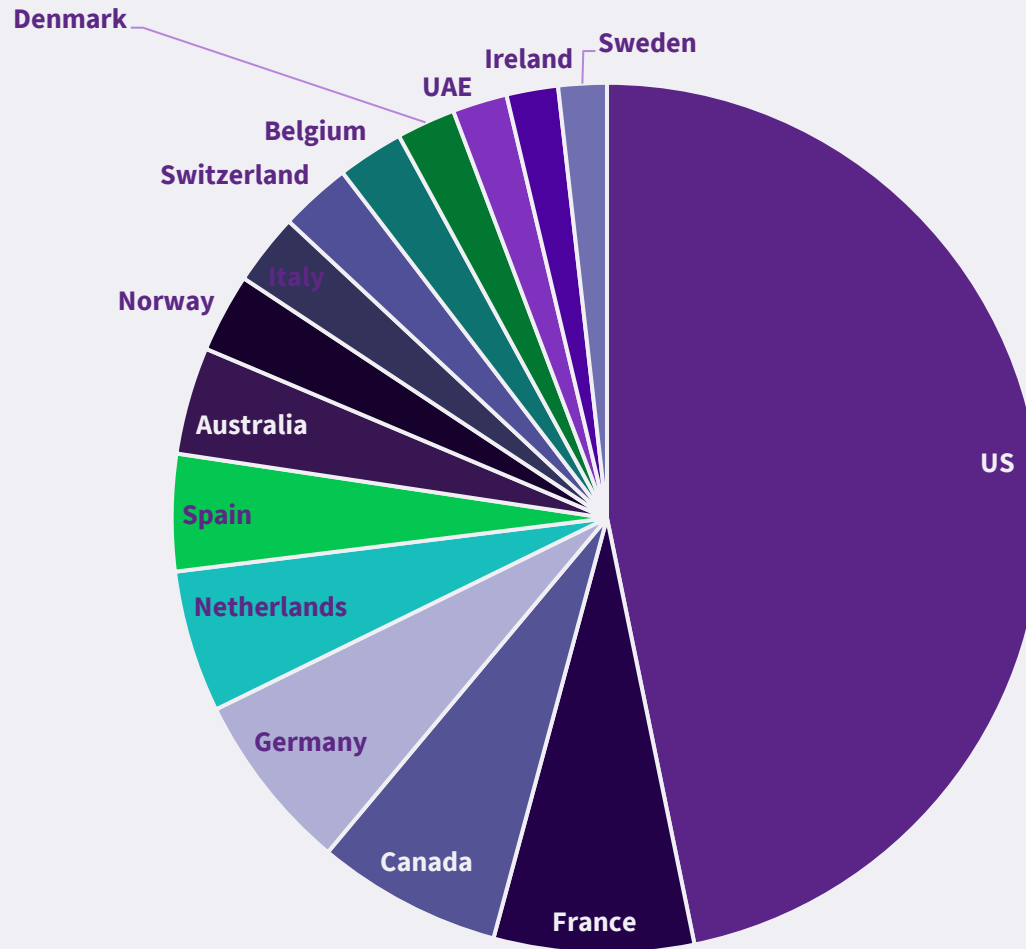
■ GB ■ North America ■ Europe ■ Rest of World

Spend



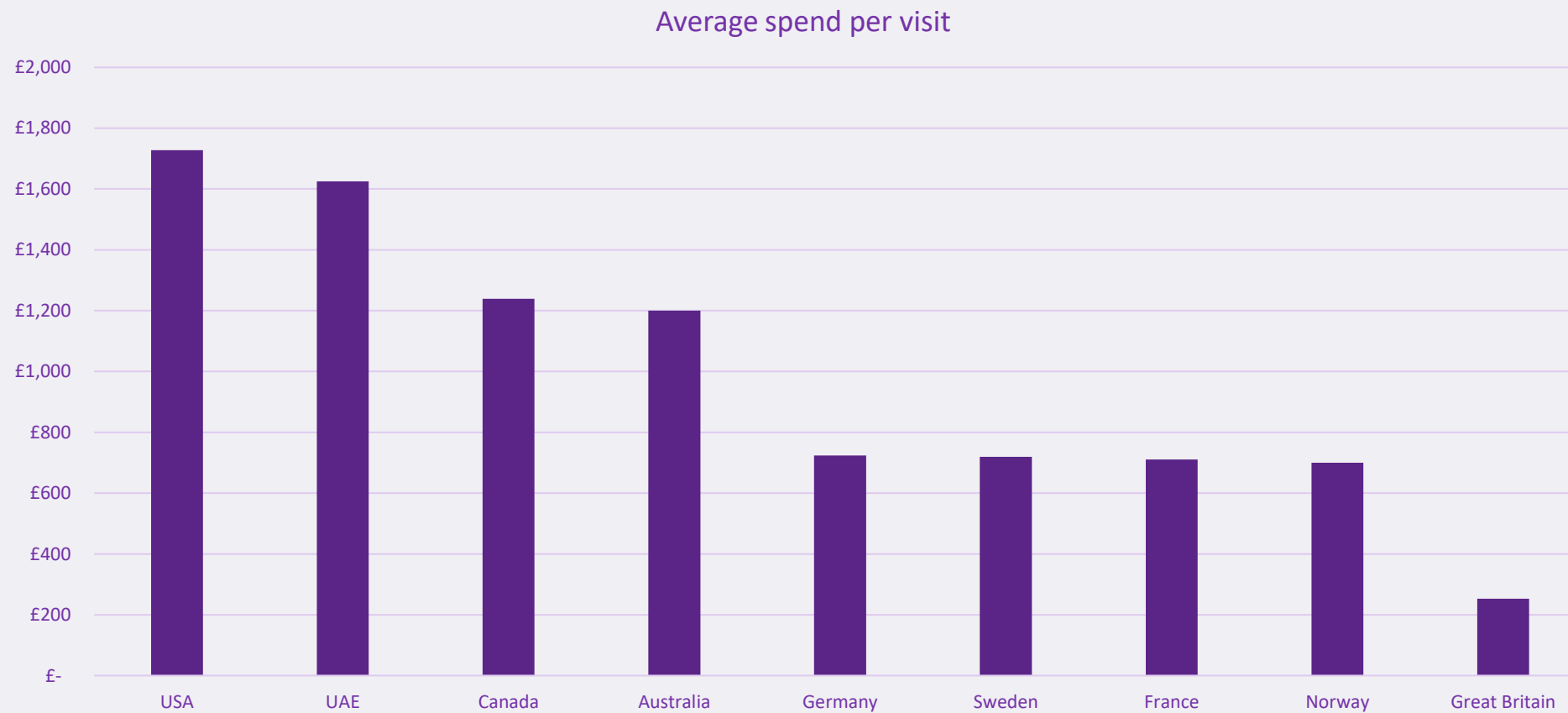
■ GB ■ North America ■ Europe ■ Rest of World

Who visited Scotland in 2022



Spend by Top 15 Countries

Who visited Scotland in 2022



2024 Inbound tourism forecast

Spending by overseas visitors in the UK



Source: International Passenger Survey to 2020 and 2022; VisitBritain model and forecasts for 2021, 2023-24.
All spending is in nominal terms (bn = billions)

#2024forecast

Strong track record

Increased connectivity, favourable exchange rates and pent-up demand have all helped bring more holidaymakers to Scotland.

- In 2022 international spend was up 24% on 2019
- In 2023 at the end of Qtr 3, **international visits up 33%** on 2022 and **spend up 19%**

International tourism in Scotland is recovering at a stronger rate than other UK nations and regions.

- Scotland was the only UK region to record an increase in visitors from North America last summer.



Reaching the 'right' audiences

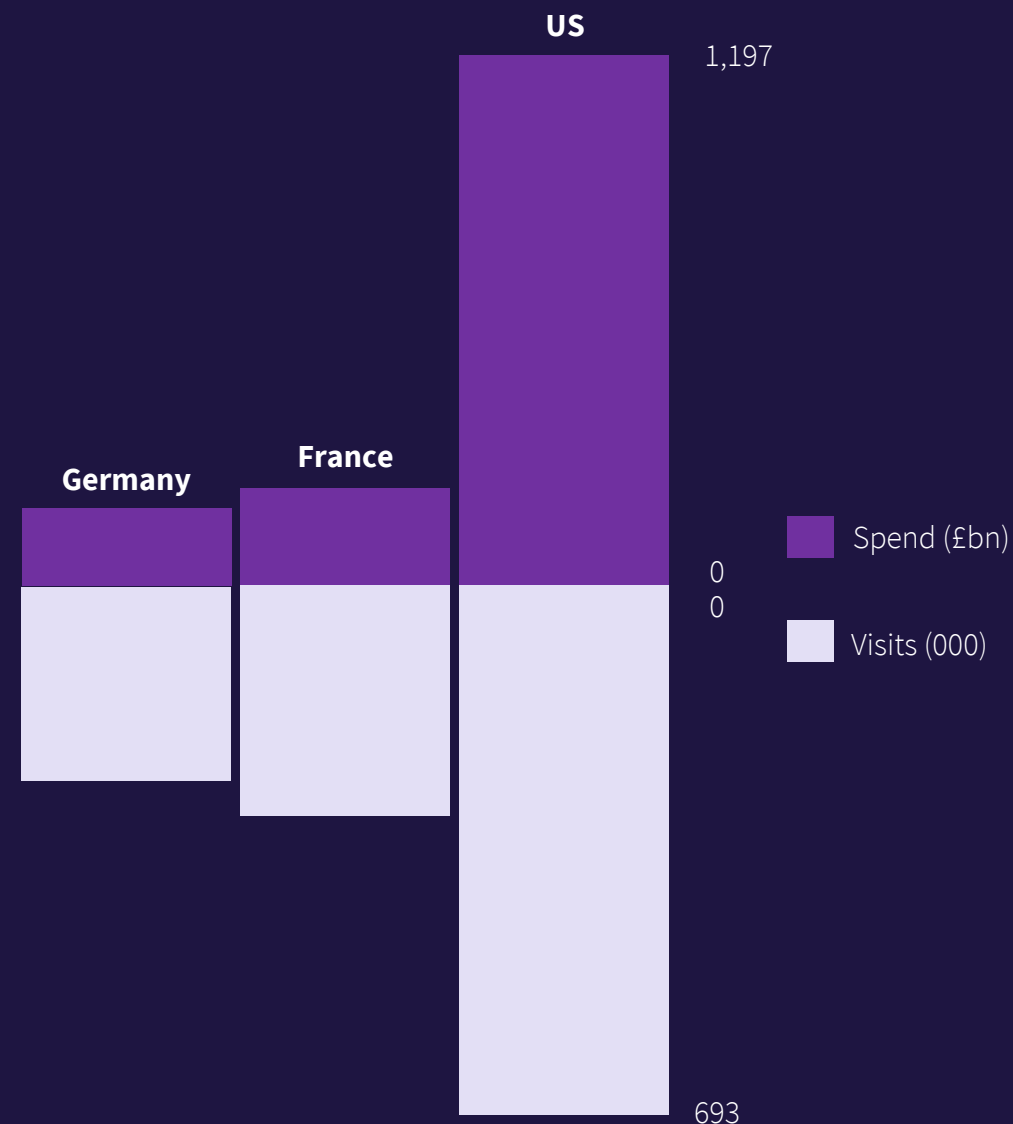
We know UK continues to drive volume and North America delivers strong international visits and the highest spend, but closer to home we see opportunity to drive further responsible travel from...

Germany

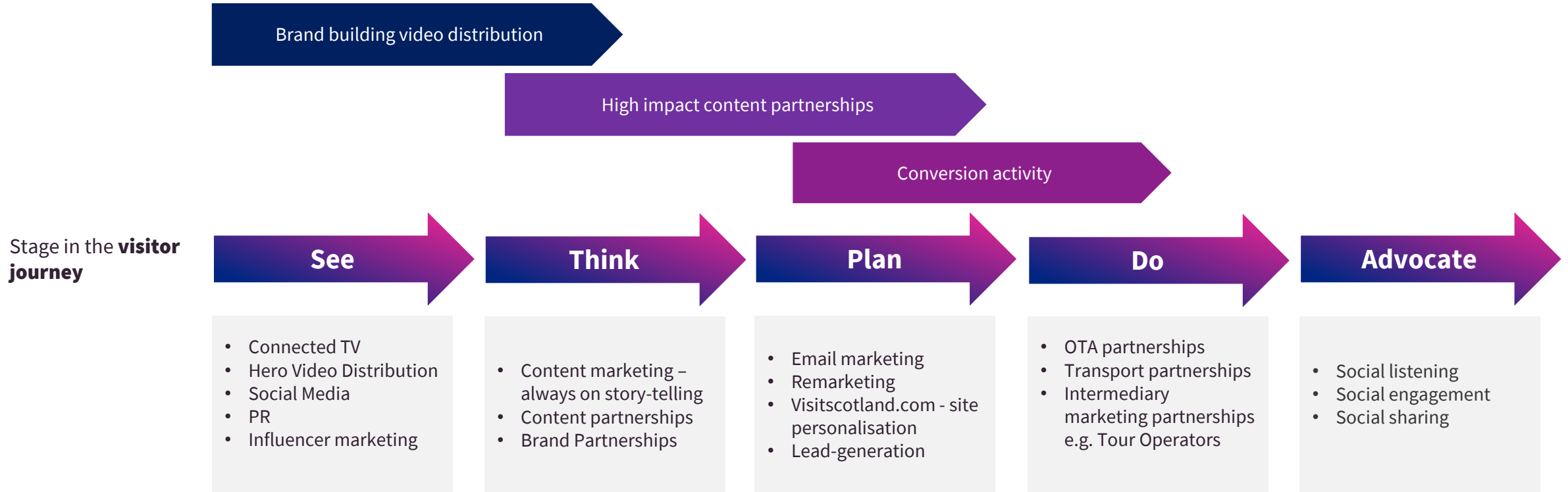
- Prolific holiday takers - 3rd largest outbound travel market globally.
- Scotland receives c.7% of their visits to Britain – room for growth.
- Strong demand for outdoor, touring, responsible and high-end.
- Good direct access.
- Scope for growth of seasonal spread.
- High demand demonstrated by 2023 visits and tour operators
 - 6 of our DE tour operators have added rail programmes to 2024 Scotland portfolio

France

- Travel to Scotland year-round delivering a more even seasonal distribution of trips.
- Long bank holiday weekends mean shoulder seasons are quite popular holiday times in France.
- 79% of our visitors come for a touring holiday; about half of them stay between 4 to 7 nights.
- >1/4 come for a short break of 1-3 nights and the remaining quarter visit for 8 nights or more.



Integrated to reach the visitor at every stage of their journey



83% of global
travelers think
**sustainable travel is
vital**

81% intend to
stay in a **sustainable
accommodation**

73% are
**more likely to
choose**
accommodation
that implements
sustainable
practices

69%
committed to
**reducing the
carbon
footprint** of
their trip or pay
to offset this

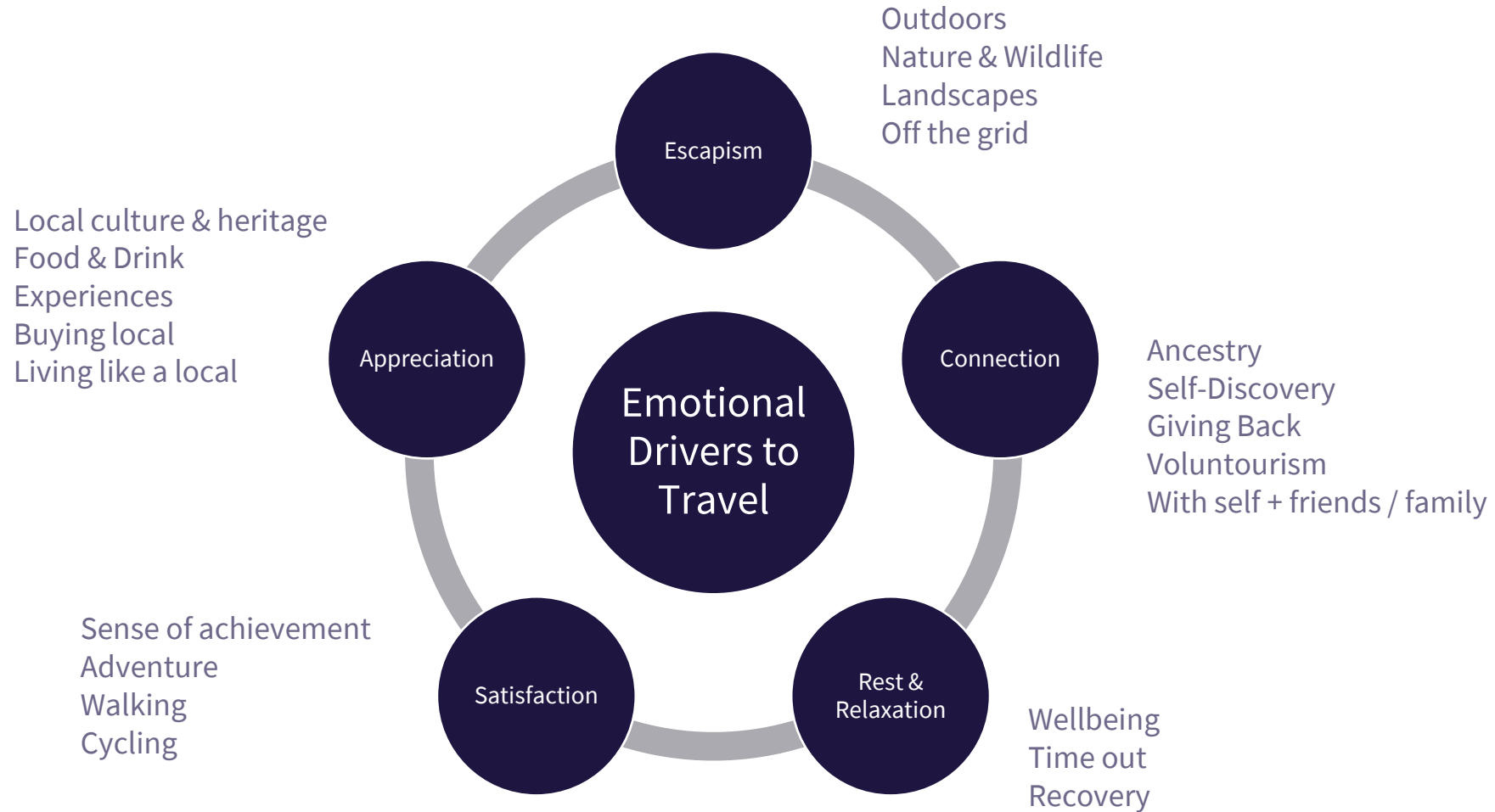
61%
pandemic has
made them
**want to
travel more
sustainably**

31% said
that they **didn't
know how to
find them**

49%
believe there
aren't enough
sustainable
travel **options**

Source: Booking.com Sustainable Travel Report 2021

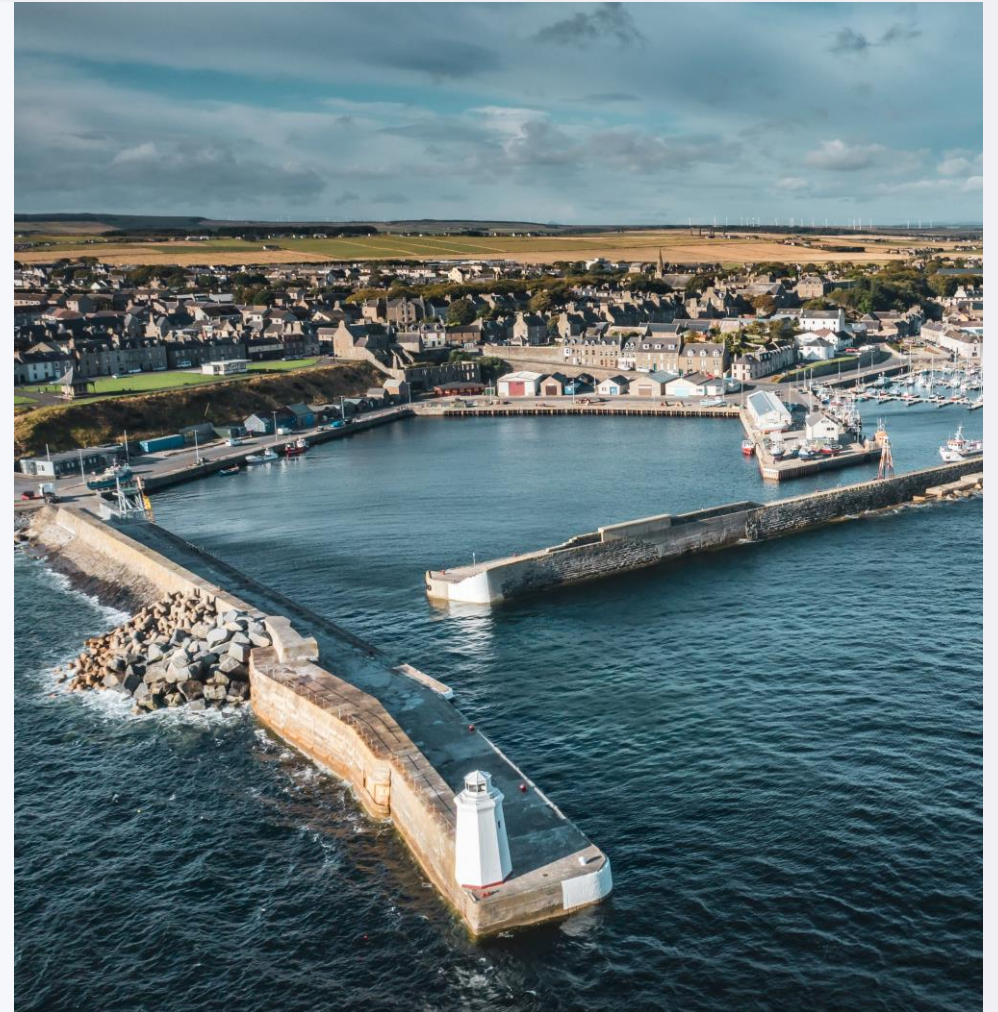
Stories developed around their needs and our product strengths



Researching trips: tours and activities



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Strategic context

Economic & political
uncertainty

New policy environment
NSET
Fair Work
National Policy Framework

Budget challenges

Climate Emergency

Competitive travel landscape &
changing traveller behaviour-
what do we need to do
differently?

Sustainable growth of the visitor economy is key to Scotland's future
economic prosperity

Public Sector Reform.
A culture of delivery = remove
duplication, increase
alignment, agility & pace

Measuring success

Outcome				
What it means for the...	<p>industry</p> <p>Spread of customers through the year and across Scotland</p>	<p>Increased yield from each visit (added value, extended stay, local spend)</p>	<p>Improved environmental footprint (supply chain, climate action, etc)</p>	<p>Improved end-to-end experience (including suppliers, staff, visitors, communities)</p>
<p>visitor</p> <p>A range of experiences with year-round and regional interest</p>	<p>Value for money and extension of trip/experience</p>	<p>Considerate of environmental and local impact of travel decisions</p>	<p>Personally enriching, quality experiences</p>	
<p>community</p> <p>A balance of visitors year-round</p>	<p>Increased spend felt locally per visitor</p>	<p>Conservation of local wildlife, nature and culture</p>	<p>Benefits of tourism felt locally (employment, infrastructure, and economic return); positive engagement</p>	

Making your voice heard

- Period of change in tourism
- Challenging public sector budgets
- Cost of doing business
- Visitor Levy
- Collective voice is vital



55%



Thanks



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