

A large, stylized purple flower graphic is positioned on the left side of the image. It features a central circular element with a three-lobed shape inside, surrounded by several curved petals and a stem with leaves. The entire graphic is rendered in a lighter shade of purple against the darker purple background.

*Visit
Scotland* | *Alba*TM

EAST LOTHIAN TOURISM CONFERENCE

MARCH 2025: NEIL CHRISTISON, REGIONAL DIRECTOR

- Global / Scotland visitor context
- How we are responding:
 - Market Development
 - Place Development (East Lothian)
 - Business & Experience Development
 - East Lothian Business Opportunity



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



Scotland is ahead of the curve

International Tourism Performance:

Overnight Trips 2023 v 2022



Scotland



4.0M visits
23%



34.4M nights
20%



£3.6BN spend
13%

Average £105 per night, 8.6 night stay, £901 per visit



Edinburgh
& Lothians

2.4M visits
29%

13.6M nights
39%

£1.53BN spend
31%

Average £112 per night, 5.8 night stay, £644 per visit

From staycation to stay-cautious

Domestic Tourism Performance:
Overnight Trips to Scotland 2023 v
2022



Scotland



12.4M visits
-8%



35.4M nights
-9%



£3.2BN spend
-4%

Average £90 per night, 2.9 night stay, £258 per visit

Edinburgh
& Lothians

3M visits
-2%

7.7M nights
-3%

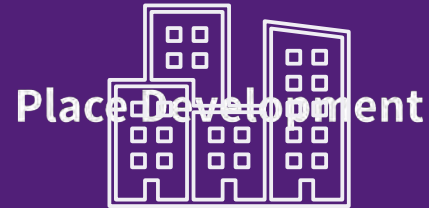
£792M spend
-17%

Average £108 per night, 2.6 night stay, £281 per visit

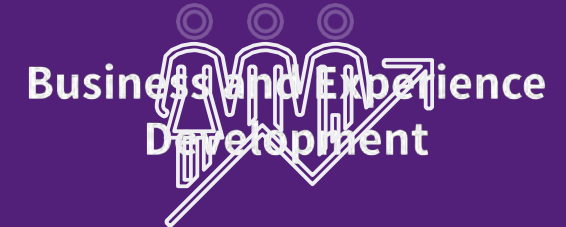
HOW WE ARE RESPONDING



Attract inbound leisure, association conferences, business and corporate travel through a mix of strategic marketing, intermediary, partner and media relations activities.



Support regional economic strategies and develop our destinations by leveraging the opportunities of public and private sector investment across tourism and events.



Deliver sector specific advice and support including helping tourism and events businesses to develop new products and visitor experiences, reaching new audiences and markets.

Attracting investment into Scotland and helping Scotland's businesses to export.

Leveraging tourism and events as a force for good for all of Scotland's people and places.

Building Scotland's international profile as a leading place to visit, live, work, study and do business.

Ensuring data, insight and technology underpins everything we deliver.

MARKET DEVELOPMENT

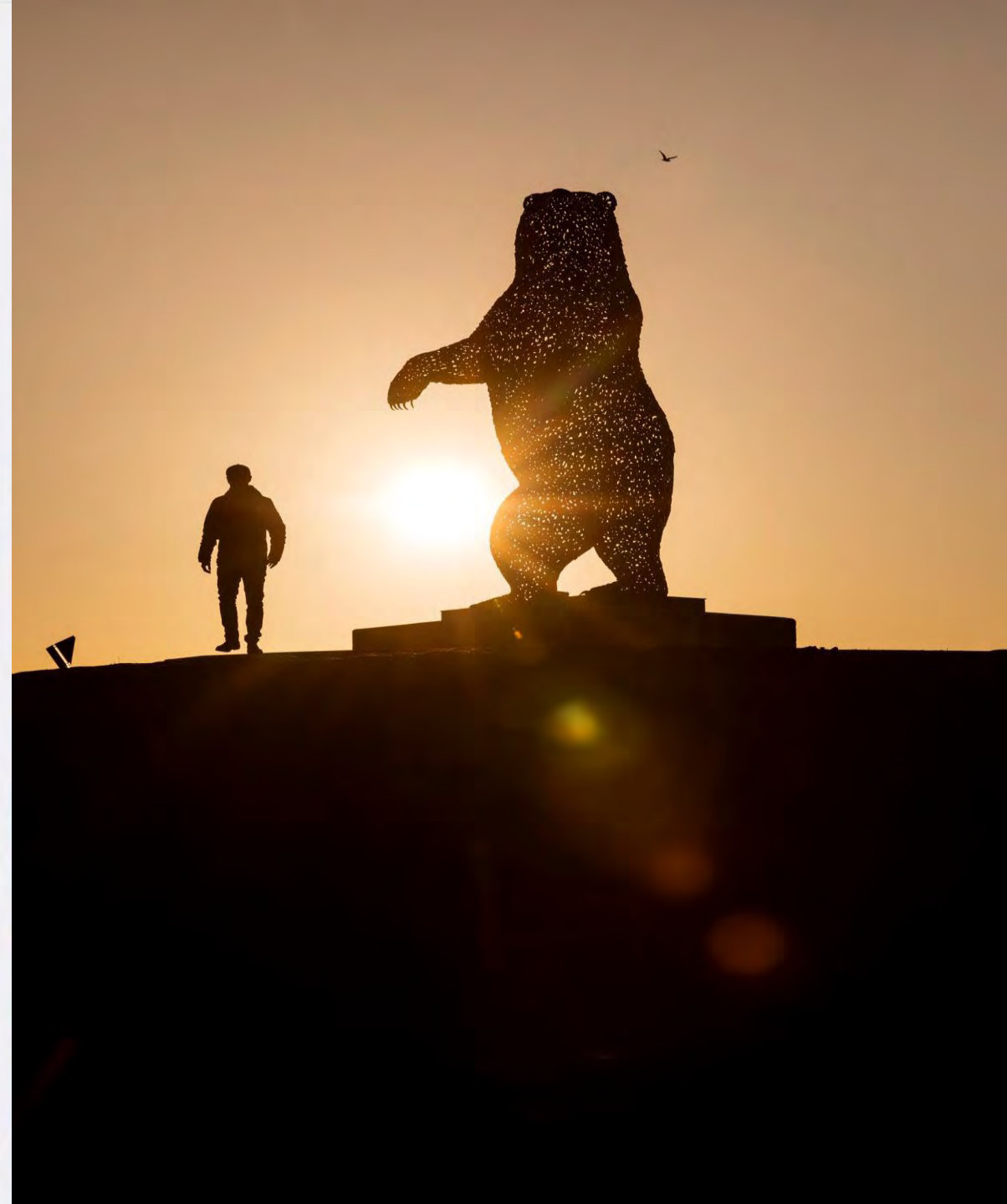
Marketing Objectives

Grow the **value** of tourism to Scotland with a focus on...

Prioritising key markets and audiences to grow Scotland's share of global travel in a **sustainable** way;

Positioning Scotland as an **inclusive year-round destination** that delivers powerfully enriching personal experiences;

Increasing the **value** per visit.



Continuing to build our global reach & scale

17 active markets worldwide

- **536M** Global PR impressions from **2250** 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



Working in Partnership



Meeting visitor demand

Globally, consumers are increasingly spending on **experiences** instead of material goods.

The wellness economy alone reached a peak **\$6.3 trillion** value in 2023, projected to grow to nearly \$9 trillion by 2028.

In travel, visitors are seeking more **meaningful travel experiences**, with a deeper understanding of their impact on their own and the planet's wellbeing.

#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

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 to the contemporary, ceilidhs and trad music, food and drink
- Volunteering and conservation – environmental restoration and conservation, rewilding, learning experiences



The visitor proposition

Visiting Scotland can have a profound effect on your wellbeing. Its natural surroundings provide a calming and rejuvenating effect for both mind and body. While immersing yourself in its rich heritage helps connect you with the past and fosters a deeper sense of belonging and of responsibility.

Our visitor proposition aims to provide a framework around which we can tell our stories and forge deeper connections with audiences seeking meaningful travel experiences.

SCOTLAND IS GOOD FOR THE SOUL

Vision

- Macro shots
- Point-of-View (PoV) shots
- Light
- Reflection

People

Touch

- PoV macro shots
- Pathways
- Texture and imprints

Sound

- Brand track
- Sounds of Scotland
- Ambient sound
- Contrasting sound

East Lothian marketing: Expedia

UK market

East Lothian 160X600

SOAK UP THE VIEWS AND RELAX
Book now

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

visit east lothian
Visit Scotland | Alba

Frame one Frame two

East Lothian 468x60

MINDFUL MOMENTS IN SCOTLAND
Book now

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

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Frame one Frame two

East Lothian 728x90

FIND BALANCE IN SCOTLAND
Book now

visit east lothian
Visit Scotland | Alba

Frame one

East Lothian 970x90

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

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Frame two

East Lothian 970x90

SOAK UP THE EPIC VIEWS IN SCOTLAND
Book now

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Frame one

East Lothian 970x90

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

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Frame two

East Lothian 300X250

REACH NEW HEIGHTS IN SCOTLAND
Book now

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

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Frame one Frame two

East Lothian 480X270

ESCAPE YOUR EVERYDAY IN SCOTLAND
Book now

SAVE UP TO 20%
on accommodation in East Lothian
terms apply
Book now

visit east lothian
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Frame one Frame two

PLACE DEVELOPMENT



CITY REGION

Edinburgh & South East Scotland



BUSINESS & EXPERIENCE DEVELOPMENT

Business and experience development

Delivering sector specific advice and support including helping tourism and events businesses to develop new products and visitor experiences, reaching new audiences and markets.

We want to enable businesses to...

- deliver world-class visitor and event experiences
- enhance business competitiveness and growth
- build stronger connections with key industry partners
- embrace sustainable and inclusive growth



Business support programme

Our year-round programme will reach more businesses through:

- tailored digital advice and support on a range of topics, provided via a new website (Business Support Hub)
- a programme of webinars and workshops
- networking and peer-to-peer learning opportunities
- marketing advice and opportunities
- climate action planning and advice on other responsible practices



Users: Tourism and events businesses

Vision: To be the go-to place for sector advice and support for tourism and events businesses.

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 (avoid duplication)
- Enhance business competitiveness and growth

Beta Site now available

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

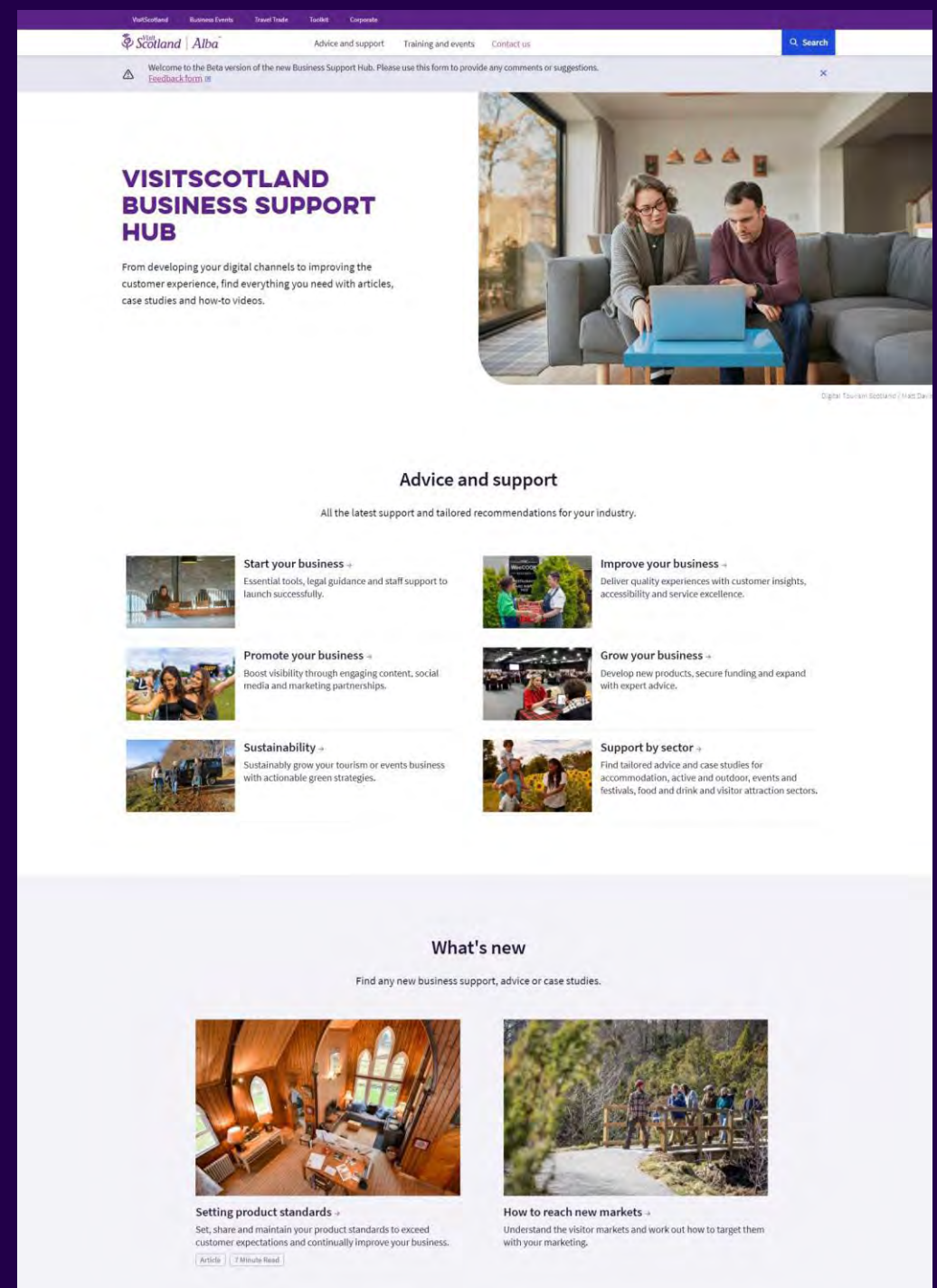
Meeting visitor expectations

What you can expect to see

- Practical advice available in multiple formats on topics we know are important to businesses
- Up to date and relevant content specific to the tourism and events sector
- The option to sign up to our business support email programme and receive the latest advice to your inbox
- Up-to-date calendar of events, training and development opportunities
- The ability to submit an enquiry to the business support team

Let us know what you think | join the user panel

Participating in our user panel gives you the opportunity to input in the development. **Go to VisitScotland.org**



2025 OPPORTUNITY



Accessible and inclusive tourism

Find advice and resources to help your business provide all visitors a great experience in Scotland.



The Scottish Thistle Awards return for 2025

03/03/2025

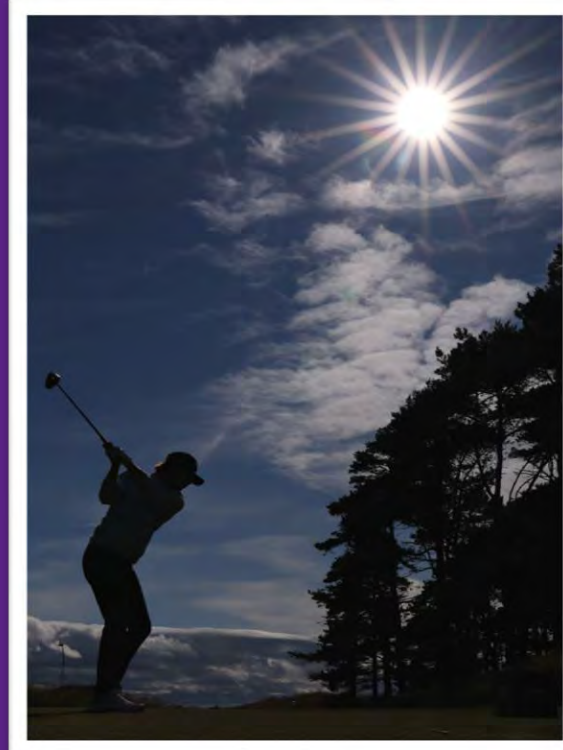
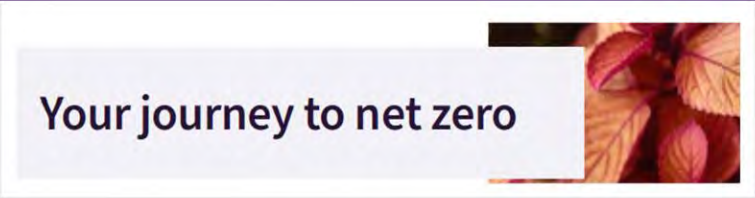
Nominations and entries are now open for this year's tourism and events awards.

All of Scotland



Business Events

We promote and support Scotland as a premier destination for business events of all kinds, including meetings, incentive travel programmes...





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THANK YOU