



MARC CROTHALL MBE

Chief Executive Officer, Scottish Tourism Alliance
Co-chair, Tourism & Hospitality Industry Leadership Group

 @st_alliance | @MCrothall  scottishtourismalliance.co.uk

 The Scottish Tourism Alliance



SCOTTISH
TOURISM
ALLIANCE

Your voice in tourism matters



INTRODUCING THE SCOTTISH TOURISM ALLIANCE

The Scottish Tourism Alliance (STA) is the largest member organisation and leading representative body for Scotland's tourism and hospitality industry.

The STA's core purpose is to represent the industry, informing key stakeholders of the need for support to overcome challenges as well as capitalize on opportunities, both now and in the future.

Working constructively with politicians, senior policy makers and civil servants, the STA seeks to influence investment and positive policy changes to create the best possible conditions for the sector to survive, thrive and grow sustainably.



KEY POLICY ASKS OF SCOTTISH AND UK GOVERNMENTS



Ensure the right policy and regulatory landscape is in place that reduces red tape:

minimising the burden of regulation and accompanying costs for industry and visitors, and fostering a long-term relationship between government and business through better joined up policy making from the outset and ongoing transparency.



Support a sustainable and professional tourism and hospitality workforce:

attracting, developing and retaining a skilled, committed, diverse and valued workforce, with the principles of Fair Work enshrined in the sector and affordable housing available for workers and their families.



Position Scotland as a world-leading visitor destination:

striving to be competitive on price, delivering a high-quality visitor experience for all, and recognising the essential role of marketing Scotland to UK and international audiences as a must-visit tourism destination.



Recognise tourism as a force for good:

develop a better relationship between visitors and local communities, with a focus on the wider benefits tourism delivers and the importance of long-term investment in destination organisations in enhancing and delivering world-class managed visitor destinations.



Deliver better transport and digital connectivity:

ensuring an enhanced and seamless visitor experience and protecting the sustainability of our local communities and businesses, while realising innovation and future-proofing opportunities for the sector.





Our Top 10 Priority Areas of Focus

- Ensuring Scotland stays a competitive destination – Marketing, Investment, VAT
- Seeking to influence favorable policy to help counter the “Rising Costs of Doing Business”
- The Transient Visitor Levy, making it work for the industry and not damage Scottish Tourism
- Making sure that tourism is understood by all, its importance and value, ensuring that is on every politicians’ local and national and all business agendas.
- Protecting DMO sustainability.
- Skills, and Fair Work addressing workforce
- Transport, connectivity and housing.
- Support to help drive innovation.
- Taxation, Regulation
- Ensuring the New Deal For Business works for tourism and hospitality



Scotland Outlook 2030 Tracker

11 March 2025

Introducing the SO2030 Tracker



- 2025 marks the mid-point of Scotland's National Tourism Strategy.
- Moment to reflect on achievements so far and what still needs to be done to meet the commitments of the strategy.
- The development of the Scotland Outlook 2030 Tracker marks a significant development on the road to 2030 and it will:
 - Allow the tourism industry to take stock of the national position.
 - Provide impartial assessment of the steps taken since the launch of the strategy in 2020.
 - Drive future phases of the Scotland's tourism journey.
 - Ensure we are delivering on the long-term potential of our industry.

You can download a copy of the tracker at [VisitScotland.org](https://www.visitScotland.org)

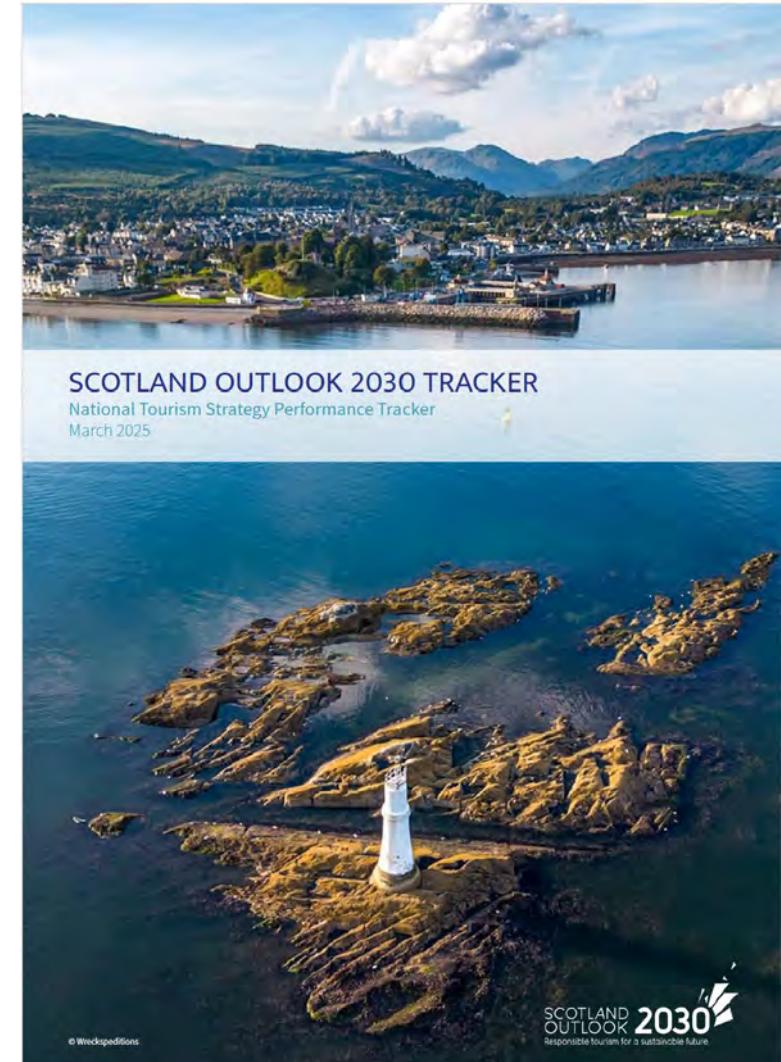
What is the SO2030 Tracker?



- The Scotland Outlook 2030 tracker monitors progress against the specific priorities set out in Scotland's national tourism strategy, Scotland Outlook 2030.
- The strategy outlines four key priorities and highlights responsible tourism commitments that inform the Tracker:
 - Our memorable experiences
 - Our passionate people
 - Our thriving places
 - Our diverse businesses
 - Responsible Tourism
- The Tracker assigns specific indicators for each of these priorities to provide measurable year-on-year data. Each of the indicators is scored as:
 - Performance maintaining: difference within +/- 5% of prior year figure (amber)
 - Performance improving: increase of 5% or more (green)
 - Performance worsening: decrease of 5% or more (red)
 - Performance to be confirmed: no prior year data currently available (grey)

Where are we now?

- The ILG appointed a working group to deliver a bespoke indicator framework in recognition of SO2030's increased range of economic, social and environmental objectives.
- The SO2030 Tracker has been developed through a collaborative process between the ILG, VisitScotland and Scottish Government economists and statisticians.
- The SO2030 Tracker allows for tourism stakeholders to monitor the progress of Scotland Outlook 2030.



Informing the Future


- The SO2030 Tracker is for the whole tourism industry and is certain to be an influential tool in identifying opportunities across the sector.
- The SO2030 Tracker will guide the work programme of the Tourism and Hospitality Industry Leadership Group and shape how the group responds to key issues.
- The indicators that are marked as red, to indicate a worsening performance, are red because they are challenging. The tracker will support the industry in tackling these areas as we head towards 2030.






Priorities for Measurement

Key:

Performance improving 

Performance maintaining 

Performance worsening 

Performance to be confirmed 

Our Memorable Experiences

- **Visitor Wellbeing** - 59% of visitors reporting that their trip in Scotland enhanced their physical, mental and emotional wellbeing. █
- **Inclusivity** - 26% of visits taken by domestic overnight visits in Scotland with an impairment. █
- **Accessibility** - 35% of visitors to Scotland with access requirements stating it was very easy to get around during their trip. █
- **Seasonal Spread** – 1.5 ratio of number of visits in peak quarter to lowest quarter. ↔
- **Visitor Spend** - £100 average visitor expenditure per visit ↔
- **Visitor Satisfaction** - 71% of visitors rating their experience as a 9 or 10 out of 10. ↔
- **Regional Spread** – 12.3 ratio of number of visits in most visited region to least visited region. ↓



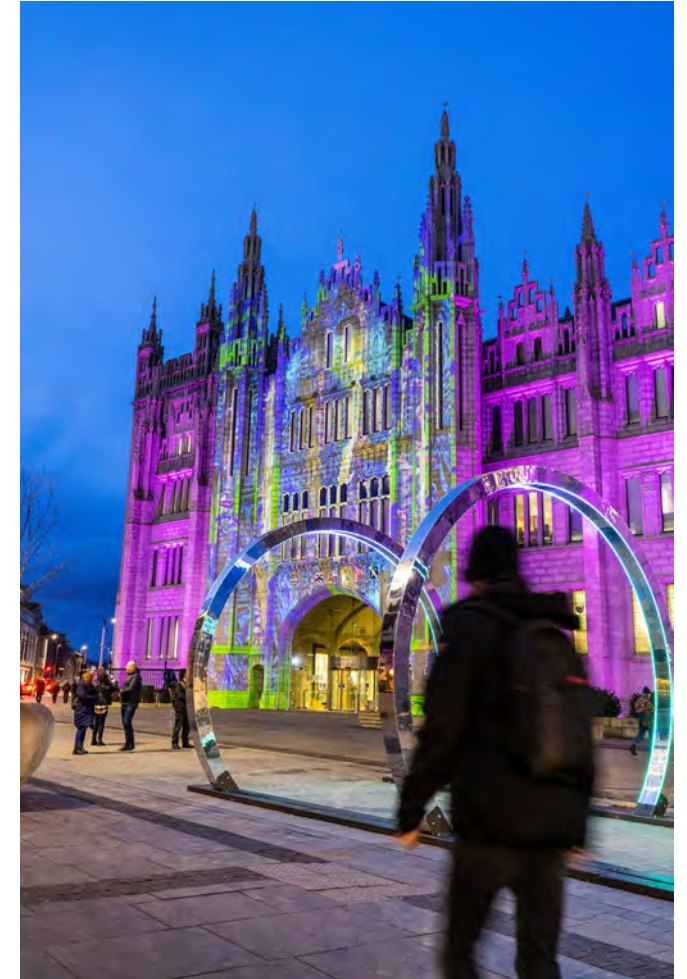
Our Passionate People

- **Fair Work:**
 - **Opportunity to Progress** - 60% of tourism businesses providing training. ↑
 - **Contractually Secure Work** – 91.6% of tourism employment who have a permanent contract. ↔
 - **Pay** – 60.3% of tourism employment paid real living wage or above. ↔
- **Diverse Workforce**
 - **Disability** – 21.1% of tourism employment who are disabled. ↑
 - **Age** – 36.7% of tourism employment who are young (16-24). ↔
 - **Sex** – 50.5% of tourism employment who are women. ↔
 - **Ethnicity** – 9.2% of tourism employment from minority ethnic background. ↔
- **Skills Shortages** - 13% of tourism businesses reporting skills shortage vacancies. ↓



Our Thriving Places

- **Community Satisfaction** - 73% agreeing that tourism has a positive impact on their local community (islands-only for now). ↔
- **Social Enterprise** - Number of tourism-related social enterprises. ↔
- **Community Engagement** - 43% agreeing their local community is engaged in tourism development and delivery (islands-only for now). █
- **Sustainable Tourism** - 22% agreeing tourism is managed sustainably in their local community (islands-only for now). █
- **Tourism Management** - 16% agreeing there is adequate provision for the number of tourists (islands-only for now). ↓



Our Diverse Businesses

- **Entrepreneurship** – 12.5% birth rate of tourism businesses (by birth year). ↔
- **Business Survival** – 60.1% 3-year survival rate of new tourism businesses. ↑
- **Environmental Sustainability** - 72% of tourism businesses taking action to reduce carbon emissions. ↑



Responsible Tourism

- **Tourism Value** – 101.3 annual GDP Index for tourism sector (2019=100). ↔
- **Employment Level** – 245,000 FTE level of tourism employment. ↑
- **Employment Contribution** – 9.2% tourism employment as a proportion of total employment. ↑





Scotland Outlook 2030 Tracker Visuals

Scotland Outlook 2030 Tracker: Visuals

Red: Performance worsening

Green: Performance improving

Amber: Performance maintaining

Grey: Performance to be confirmed

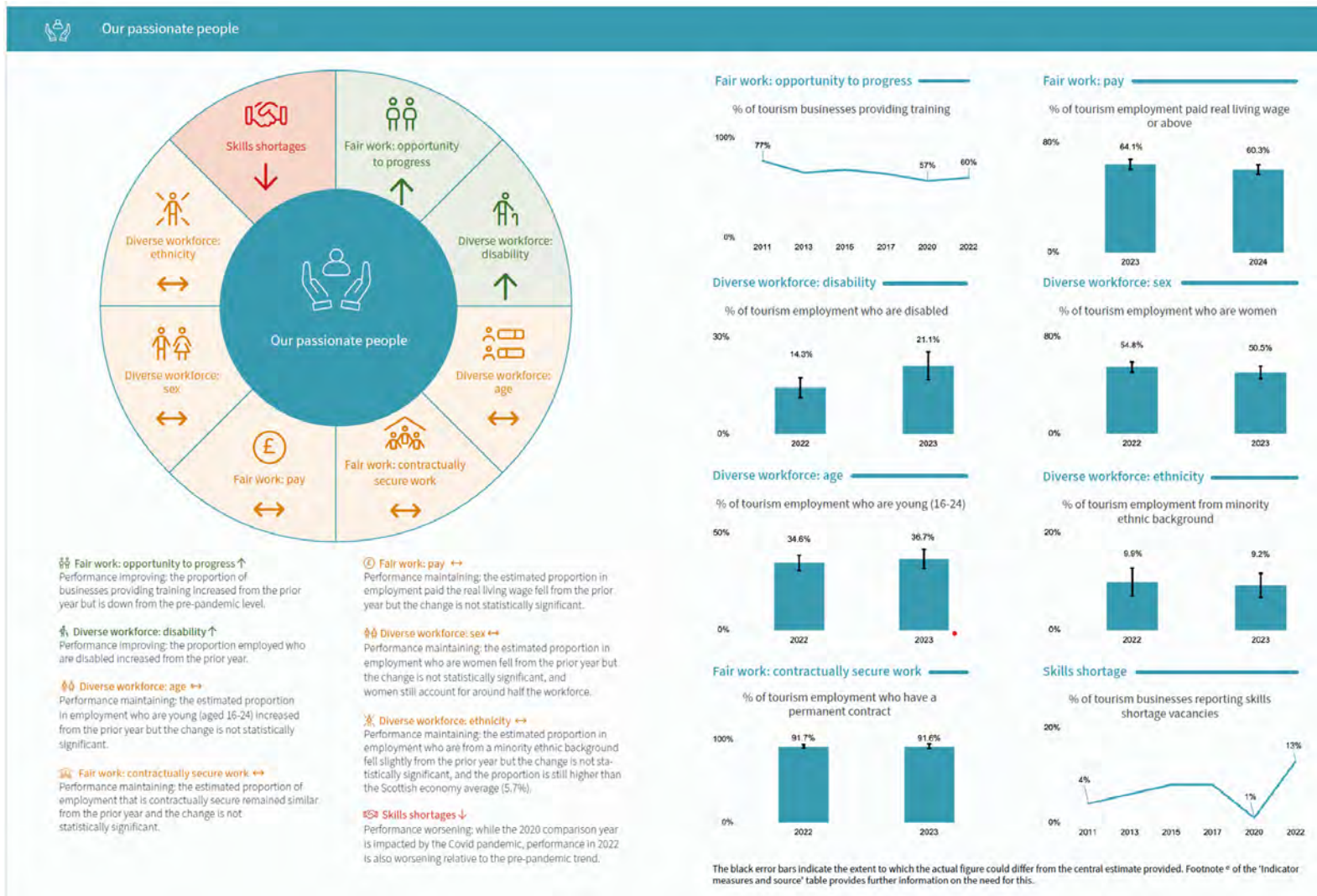
SCOTLAND OUTLOOK 2030
Responsible tourism for a sustainable future

National Tourism Strategy
Performance Tracker
March 2025

	Performance improving	Performance worsening	Performance maintaining	Performance to be confirmed
Our memorable experiences				
Visitor satisfaction			●	
Visitor wellbeing				●
Inclusivity				●
Accessibility				●
Seasonal spread			●	
Regional spread		●		
Visitor spend			●	
Our passionate people				
Fair work : pay			●	
Fair work: contractually secure work			●	
Fair work : opportunity to progress	●			
Skills shortage		●		
Diverse workforce: sex			●	
Diverse workforce : age			●	
Diverse workforce : disability	●			
Diverse workforce : ethnicity			●	
Our thriving places				
Community satisfaction			●	
Community engagement				●
Sustainable tourism				●
Tourism management		●		
Social enterprises			●	
Our diverse businesses				
Entrepreneurship			●	
Business survival	●			
Environmental sustainability	●			
Responsible tourism				
Growth in tourism value			●	
Employment contribution	●			
Employment growth	●			

At a glance: Easy to view performance of each indicator

Context setting: Explaining the trends behind the indicator's performance



Charts: Visualisations over the long/short term dependent on data available



THANK YOU

For your time and for your support, please stay connected and follow the STA
Take a look at our [Policy Agenda](#) when you have a minute.

 @st_alliance | @MCrothall  scottishtourismalliance.co.uk

 The Scottish Tourism Alliance



SCOTTISH
TOURISM
ALLIANCE

Your voice in tourism matters