

Constitution, Europe, External Affairs & Culture Committee: National Outcomes

Submitted: 14 June 2023

VisitScotland welcomes the opportunity to contribute to the Committee's consideration of the Scottish Government's review of its National Outcomes. As Scotland's national tourism organisation, we play a vital role in supporting the industry to achieve the ambitions of the national tourism strategy, Scotland Outlook 2030¹, for Scotland to be a world leader in 21st century tourism.

We are working hand in hand with partners and our tourism and events industry to rebuild this vital part of Scotland's economy and provide the right support to lead the sector's full recovery. In doing so, we also play a key role in contributing to the National Strategy for Economic Transformation (NSET)².

VisitScotland's core purpose is to deliver a strategic and coordinated approach to supporting the visitor economy in a responsible way. To achieve this, we deliver activity aligned to the Scottish Government's National Outcomes, including the 'International' outcome.

It is important to recognise that of the six dimensions measured by the Anholt-Ipsos Nation Brands IndexSM³ used to measure Scotland's reputation, the tourism dimension scored (72.3 points and 12th out of 60 countries) among the highest of all the measures.

VisitScotland contributes to the International National Outcome in a number of ways through our core activity. In considering the Committee's focus on the promotion of trade and culture, we have set out some of our key activity that covers this area below.

Marketing

Our marketing strategy is to position Scotland as a year-round destination that stands out to visitors, increasing the propensity to visit Scotland, connecting the industry in Scotland with new audiences & markets. We use a variety of channels (Digital, PR, Media Partnerships) and work closely with a wide range of international partners including Scottish Government, SDI, VisitBritain, Transport Providers (airlines & ferry operators) and travel intermediaries to achieve our objectives. Our activity is designed not only to respond to the immediate needs of industry but also the long-term goals of building demand and growing the visitor economy.

Along with Brand Scotland partners we aim to position Scotland as a welcoming, inclusive and progressive country. From a tourism specific perspective, we are positioning Scotland as a year round destination that delivers powerfully enriching personal experiences. Our strategic focus is to grow the value of the visitor economy in a sustainable way with a key focus on ensuring regional and seasonal spread of visitors and increasing spend per trip to maximise the community & economic benefit of every visit. Content within our activity promotes all the aspects of what makes Scotland unique and includes themes such as Landscape & Nature, Rural & Island Experiences, History & Culture, Food & Drink and Adventure.

Priority markets include the UK & USA; Secondary markets, Germany, France, China, Canada;

¹ [Scotland Outlook 2030 - Scotland's tourism strategy \(scottishtourismalliance.co.uk\)](https://www.scottishtourismalliance.co.uk)

² [Scotland's National Strategy for Economic Transformation - gov.scot \(www.gov.scot\)](https://www.gov.scot)

³ [Scotland's Reputation 2022 - The Anholt-Ipsos Nation Brands IndexSM: 2022 - gov.scot \(www.gov.scot\)](https://www.gov.scot)

Tertiary: Italy, Spain, Australia, Middle East, Netherlands, Nordics

One recent example of this activity was our £6.5M Scotland Is Calling campaign launched to build international demand following the 2020 lockdowns.

The campaign launched in September 2021 across UK, Germany, France, US, Canada and China, with Spain, Italy, Netherlands, Sweden, Norway and Australia incorporated from February 2022. Inspirational videos of Scotland were shared across digital and social media channels as well as TV. We had 38 content partnerships working with the likes of National Geographic and inspirational travel platform Matador and five Online Travel Agent (OTA) partners such as Expedia.

The campaign saw over 101 million videos being viewed to the end. There were over 8.8 million sessions on Visitscotland.com - a significant year-on-year increase and 1.2 million page views of content articles on partner websites, with higher than usual engagement in the articles. Bookings through Online Travel Agent partners attributable to the campaign equated to over US\$34 million value and over 151,000 room nights.

Our industry development work focuses on providing advice to businesses on different international market opportunities, advice on channels to market including connecting the industry in Scotland with international trade buyers helping them to grow their business and international footprint.

An important example of a collaborative team Scotland approach is Tartan Week. VisitScotland work alongside Scottish Government and SDI to create a programme of stakeholder, media and consumer activation activity leveraging Tartan Week as a key time of the year to raise Scotland's profile in North America. VisitScotland lead on the media relations and consumer activation activity.

This year along with industry partners Diageo and the V&A our media activity was picked up by 339 online media sites and the total audience reach was over 280.6 million unique visitors. A partnership with NBC produced content including live segments, billboards and social distribution. This activity generated 1.8 million campaign impressions, and more than 500K social engagements. Three NYC bars also hosted a specially curated cocktail menu for Tartan Week, with cocktails representing the four corners of Scotland.

Through a robust evaluation methodology we are able to measure the incremental (Net Economic Impact or NEI) impact of VisitScotland's consumer marketing activity on an annual basis. This is detailed in our annual report⁴. The NEI is new money in the economy that would not have been delivered without VisitScotland intervention, such as the Scotland Is Calling campaign.

Looking at all our international consumer marketing activity for short haul / Europe, our latest (2019) NEI was £14.0 million. And for long haul, the 2019 NEI was £8.8 million.

⁴ [Our Annual Performance Report | VisitScotland.org](#)

Travel trade / VisitScotland Connect

Engagement with the travel trade (tour operators, travel agents) is an important part of our work to sustainably grow Scotland's visitor economy. International visitors stay longer and spend more and over 50% of them use travel intermediaries to plan and book their travel.

By building strong relationships with intermediaries, we can increase Scotland's product offering, resulting in new and renewed partnerships, direct air routes and extension of our travel agent network.

This year, we delivered VisitScotland Connect, which saw 175 tourism businesses connect with over 250 tour operators and travel agents representing 23 countries. The event offered Scottish businesses the chance to show their products and services directly to buyers from the UK, USA, Canada, Europe and Asia Pacific. The aim was to help the country's valuable tourism industry reach new visitors in new markets, in turn increasing international demand for Scotland's diverse tourism offering.

Over 6,000 meetings took place, as well as a programme of day and evening networking opportunities. As part of a special programme of 'familiarisation' trips, selected international buyers were also able to travel around the country to sample, in-person, the scenery, hospitality, produce and attractions of many regions and destinations.

In 2019, the NEI for Expo (Scotland Connect) was £2.0 million.

Route Development

The return of international tourism has been both crucial to the sector's recovery and an important driver in fostering Scotland's reputation as a connected and outward-facing nation.

We have played a significant role in the development and support of Scotland's aviation route network. Working closely as part of a Team Scotland partnership including Transport Scotland and SDI, VisitScotland has helped to develop and support a route development strategy to support Scotland's inbound tourism, business connectivity, exports and inward investment.

Our priority post-pandemic was good connectivity to major hub airports. This enables onward connectivity to many other destinations. We look to re-establish connections, but also getting the required frequency back to maximise onward connectivity.

Through 2022 onward, the North American market has been the driver of recovery of high yield tourism into Scotland. This has presented the opportunity for Team Scotland to make a priority of encouraging new routes and increased capacity from the US and Canada.

Recent examples of route development include the resumption of Hainan's twice-weekly route between Edinburgh and Beijing and a direct Delta Airlines flight between Edinburgh and Atlanta. With our cities being important gateways to the rest of Scotland, every region and destination stands to benefit from these developments.

In 2019, the NEI for Route Development (aviation) marketing activity was £18.8 million.

EventScotland

Through a One Scotland approach, we look to develop a strong and dynamic events industry producing a portfolio of events and festivals that delivers sustainable impact and international profile for Scotland.

Events strengthen Scotland's position as a world-leading destination, and Scotland continues to successfully attract and deliver some of the world's biggest events alongside our enviable portfolio of annual events and festivals.

Scotland has a long-standing international reputation as a world class event host – we have confidence of event owners and rights holders in Scotland's ability to deliver at the highest quality.

Our success in bidding for and successfully hosting major events can be evidenced through Commonwealth Games; Ryder Cup; World Gymnastic Championships; Solheim Cup; European Championships; Euro2020; COP26 and this year's inaugural UCI Cycling World Championships, where the eyes of the world will be on Scotland in August 2023 for the biggest cycling event in history.

Our Year of Stories (YoS) 2022⁵ was another good example of international profile building. Over the course of the year, stories inspired by, created, or written in Scotland were showcased and celebrated. This latest Themed Year generated 1.4 million attendances at 201 YoS funded events, 354 funded and partner events across all 32 local authorities, created 6,620 opportunities for artists at YoS events, 100 of communities and organisations shared their diverse stories

Over the twenty-year period between 2003 and 2023, EventScotland has supported 3094 events across key programmes, invested £63.5 million in those events, resulting in a £1.6 billion NEI from outside Scotland.

Spanning a twenty-year period (2003-2023), EventScotland has supported (golf specific) 103 events, and invested £67 million in golf events resulting in a £614.5 million NEI from outside Scotland.

Supporting events that have a high international profile and programme are a key aspect of the delivery of our current National Events Strategy (currently being reviewed/ refreshed). Scotland's rich cultural offer is central to how the rest of the world views us.

Other activity

There is a host of other activity that VisitScotland carries out that impacts on the international reputation of Scotland. That activity includes, but is not limited to:

- Business events – which draw the world's experts to Scotland to discuss global issues, leveraging Scotland's impact on the world; are a strategic tool and driver for diverse Scottish brands and products; offer economic benefit to all corners of Scotland (about £2 billion), including the Highlands and Islands and all of our rural areas via resort hotels servicing corporate conferences as well as outposts for academic centres of excellence.
- International Hubs – provide regular touch points to share destination information and content, and opportunities to collaborate on events; provide opportunity to receive updates, intelligence, support for our activities and amplification of messaging; joint participation (or support) in and delivery of in-market and virtual events.
- International partnerships – provide opportunities to work with other tourist boards, governments, EU institutions and international networks to develop relationships that enhance our reputation and global profile; they enable access to good practice, strategy and

⁵ [Scotland's Year of Stories - Themed Year Results | VisitScotland.org](https://www.visitScotland.org)

insight; and provide an opportunity for Scotland to influence others. An example of this includes the UNWTO Smart Destinations conference, where VisitScotland was selected to present as a destination at the forefront of efforts to lead the transformation to responsible tourism. Over 1000 international delegates attended.

We trust that this information will be useful for the Committee in your ongoing considerations of the Scottish Government's National Outcomes, however, if you require any further information, please do not hesitate to get in touch.

Prepared by VisitScotland

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