

THE **FUTURE**  
OF OUR INDUSTRY  
IN **OUR HANDS**



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# TOURISM IN NUMBERS 2014

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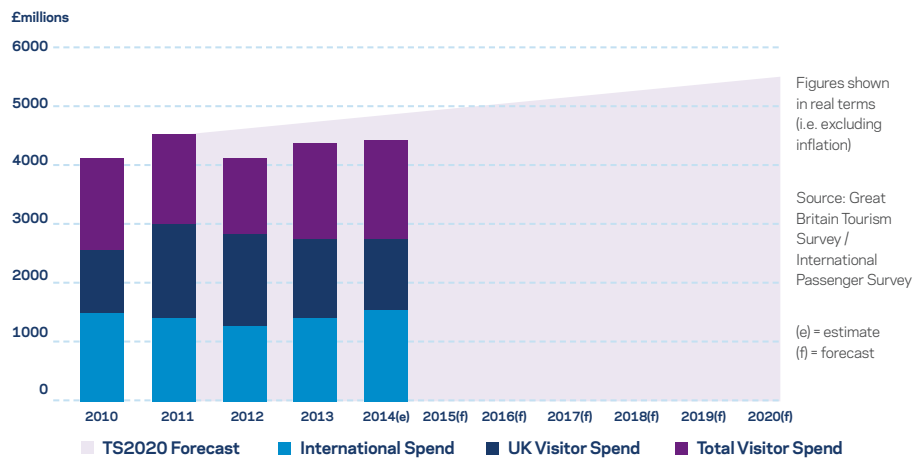


# VISION

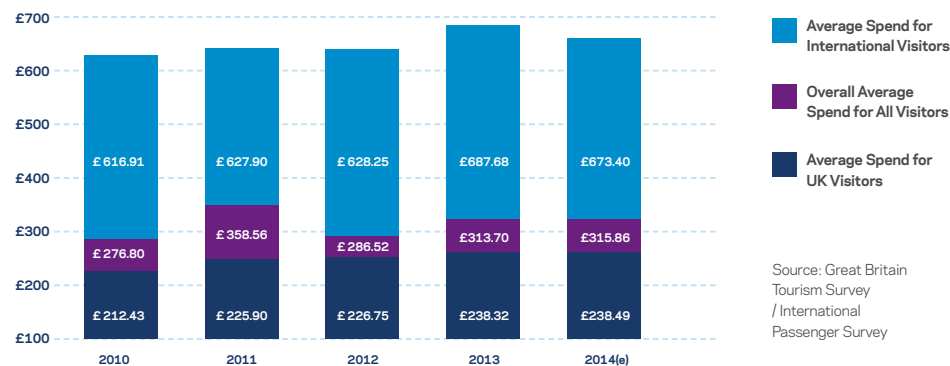
**“Scotland will be a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people.”**

# INDUSTRY PERFORMANCE

## Total Overnight Visitor Spend



## Average Visitor Spend

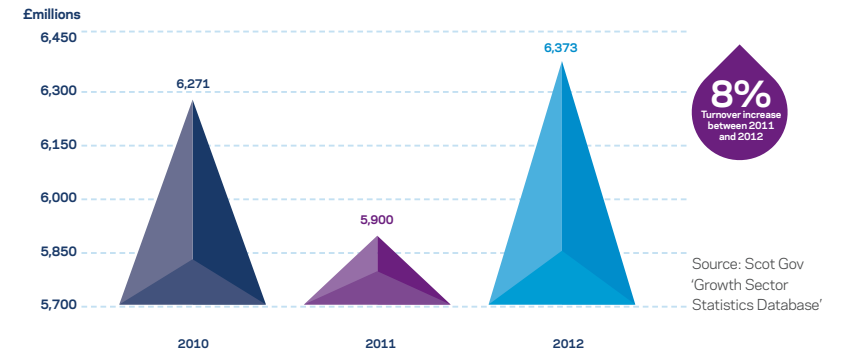


## Total Growth Markets Overnight Spend

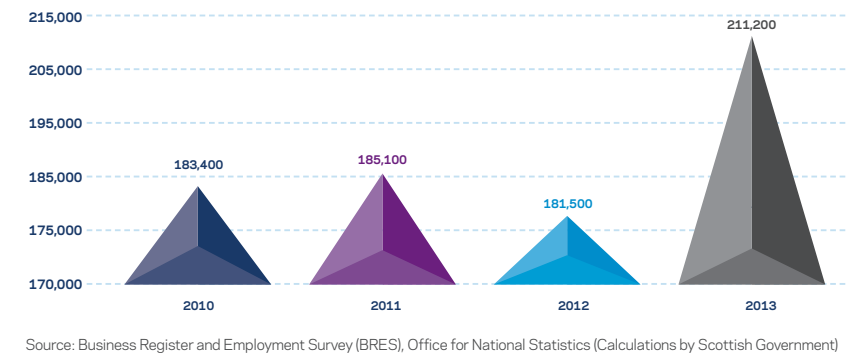
Spend (£ million / Nominal)	2010	2011	2012	2013	2014(e)	2020(e)
Home Turf	2,517	3,018	2,892	2,889	2,921	3,586
Near Neighbours	660	732	641	706	709	875
Distant Cousins	348	414	450	463	617	505
Emerging Markets	45	34	55	78	100	70

Source: Great Britain Tourism Survey / International Passenger Survey

## Total Tourism Turnover



## Tourism Jobs



The following figures are indicative of the many activities aligned with Tourism Scotland 2020. Where possible 2014 figures are used, however where they are not available the most recent values have been used. For a full list of references, please go to <http://scottishtourismalliance.co.uk/tourism-scotland-2020/2014refs>.

# SKILLED AND PASSIONATE PEOPLE

**9,506**

Total participants in Glasgow  
Welcome activities

**152**

HIT Scholarships  
awarded

**100**

Schools  
participated  
in Future Chef  
competition

**890**

Flexible Training  
Opportunities  
approved in last  
2 years

**663**

Registered for  
online Accessibility  
Training

**3,279**

Tourism & Hospitality Modern  
Apprenticeships

# CONNECTIVITY

## DIGITAL

**66%**

Visitors satisfied with mobile  
reception availability

**54%**

Visitors satisfied with wi-fi and  
broadband availability

**160+**

Tourism businesses applied  
for H&I Digital Tourism Pilot

**33%**

Accommodation listings on  
VisitScotland.com which are  
bookable online

## TRANSPORT

**£5.9bn**

Total investment  
in transport  
infrastructure

**23m**

Passengers  
arriving at  
Scottish airports

**9.6m**

Passengers using  
ferries (into &  
around Scotland)

**28+**

New air routes  
into Scotland

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# FOOD AND DRINK

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**£549m**

Spent by GB visitors on food & drink

**15%**

Extra visitors are willing to pay for food that is of Scottish or regional origin

**76%**

Visitors satisfied with availability of local produce

**£1 in £5**

spent on food and drink

**570**

Taste Our Best businesses

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# SUSTAINABLE DESTINATIONS

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**803**

Green Tourism certified businesses in Scotland

**22**

Destination strategies

**11**

Regions working towards WorldHost Destination status

Sustainability requirements now incorporated in VisitScotland Quality Assurance Scheme

**£700.8m**

Total economic impact of holiday park sector

**UP 20%**

Spend from people travelling with a disability in last 5 years

# HERITAGE AND CULTURE

# NATURE AND ACTIVITIES

UP  
8.4%

Annual Sales of  
Scottish Heritage Pass

3.6m

Record visitor numbers at  
Historic Scotland sites

Ambition to grow visitor expenditure from

£1.3bn to  
£1.7bn

by 2020

UP 6.1%

Visitors to visitor attractions

£44m

Growth in sailing tourism by 2020

250,000

Spectators from 96  
countries at Ryder Cup

360+

Adventure tourism  
providers

500m

Homes reached  
by Ryder Cup  
coverage

340,000+

Spectators at 2014 golf events

# EVENTS AND FESTIVALS

**1st**

Time the Fringe issued  
over 2m tickets

**>2 million**

Attendance at Homecoming events

**£282m**

Commonwealth Games visitor spend

**UP  
7%**

Audience across all  
12 Edinburgh Festivals

**95%**

Accommodation occupancy  
during Commonwealth Games

**1049**

Homecoming events  
across Scotland

# BUSINESS TOURISM

**BUSINESS TOURISM  
FOR SCOTLAND**

Business Tourism for Scotland  
website launched



Think Scotland, Think Conference  
initiative launched

**400+**

Business tourism  
venues in  
Scotland

**60%**

Business tourism venues  
outside Edinburgh  
& Glasgow

Grow economic  
impact of business  
tourism from

**£1.9bn to  
£2.3bn**

# WORKING TOGETHER FOR GROWTH

## Tourism Intelligence Scotland

**998**

people registered  
for webinars

**1364**

downloads of  
Intelligence Guides

**31,500**

visits to website  
(tourism-intelligence.com)

**6510**

subscribers to  
E-zines

Scottish Tourism  
Alliance  
represents over

**50%**

of tourism  
businesses in  
Scotland

**557**

Applicants for  
Thistle Awards

**8**

### Tourism Strategy Industry Groups

Strategy Leadership Group,  
Outdoor Tourism Group,  
Marine Tourism Development Group,  
Heritage Tourism Group,  
Business Tourism for Scotland,  
Events & Festivals,  
Destinations Group & Tourism Skills Group

**1000+**

Number of delegates at  
STA 2014 events

# 2015 & BEYOND

## TOURISM GROWTH STRATEGIES LAUNCHED IN 2015

Heritage Tourism  
Marine Tourism  
Country Sports Tourism

## INTERNATIONAL EVENTS IN 2015 include

The Open at St Andrews,  
Turner Prize, World Gymnastics  
Championship, MOBO Awards

**£10.2bn**

Tourism-related investment  
over next 3 years

## Themed Years

2015: YEAR OF FOOD & DRINK

2016: YEAR OF INNOVATION,  
ARCHITECTURE & DESIGN

2017: YEAR OF HISTORY,  
HERITAGE & ARCHAEOLOGY

2018: YEAR OF YOUNG PEOPLE

**2020  
AMBITION**

Increase visitor spend from

£4.5bn to  
**£5.5bn-£6.5bn**



## Partners

The growth and success of Scottish tourism is dependent on everyone in the sector working together towards a common vision. The sector is full of successful partnerships and collaborations, and we acknowledge and thank the many organisations and tourism businesses who have contributed to this report and help make Scottish tourism a success.



### Scottish Tourism Alliance

Old Town Jail  
St John Street  
Stirling, FK8 1EA

Tel: 01786 459 235  
mail@stalliance.co.uk  
www.scottishtourismalliance.co.uk

