



*Visit
Scotland* | *Alba*TM

DRIVING DOMESTIC & INTERNATIONAL DEMAND 2025-2026

2 October 2025

Jill Walker Director
of Marketing

Nothing special but rather rare.



Jill Walker

Director of Marketing, VisitScotland

- Latest Insights and trends
- How we are responding:
 - VisitScotland Marketing Strategy 2025-26
 - Business Support Programme
 - Scotland's Storytelling Community - working as one.



Insights and Trends

Who Visited Scotland in 2024?

Despite relatively strong international volumes, cumulative performance across all overnight stays in Scotland during 2024 is down across trips (-9%) and nights (-14%) compared with 2023, with spend associated with these trips increasing by 8%.

Region of Residence	2023 Visits (m)	2024 Visits (m)	% Change visits	2023 Spend (£m)	2024 Spend (£m)	% Change Spend*	2023 Nights (m)	2024 Nights (m)	% Change nights
England	5.1	4.4	-13%	1,551	1,832	18%	17.2	14.4	-16%
Scotland	7.2	6.0	-16%	1,562	1,441	-8%	17.7	14.3	-19%
Wales	0.2	0.2	29%	75	64	-15%	0.6	0.8	35%
Northern Ireland	0.3	0.2	-20%	105	98	-7%	1.2	1.0	-17%
North America	1.0	1.1	15%	1,417	1,577	11%	8.8	8.4	-5%
Europe	2.3	2.6	11%	1,411	1,662	18%	15.3	15.0	-2%
Rest of World	0.7	0.7	-1%	764	742	-3%	10.2	7.3	-28%
Total	16.7	15.2	-9%	6,885	7,416	8%	71.0	61.3	-14%



Source: Great Britain Tourism Survey, Overnight Trips (2024), NI Annual Tourism Statistics (2024), International Passenger Survey (2024)

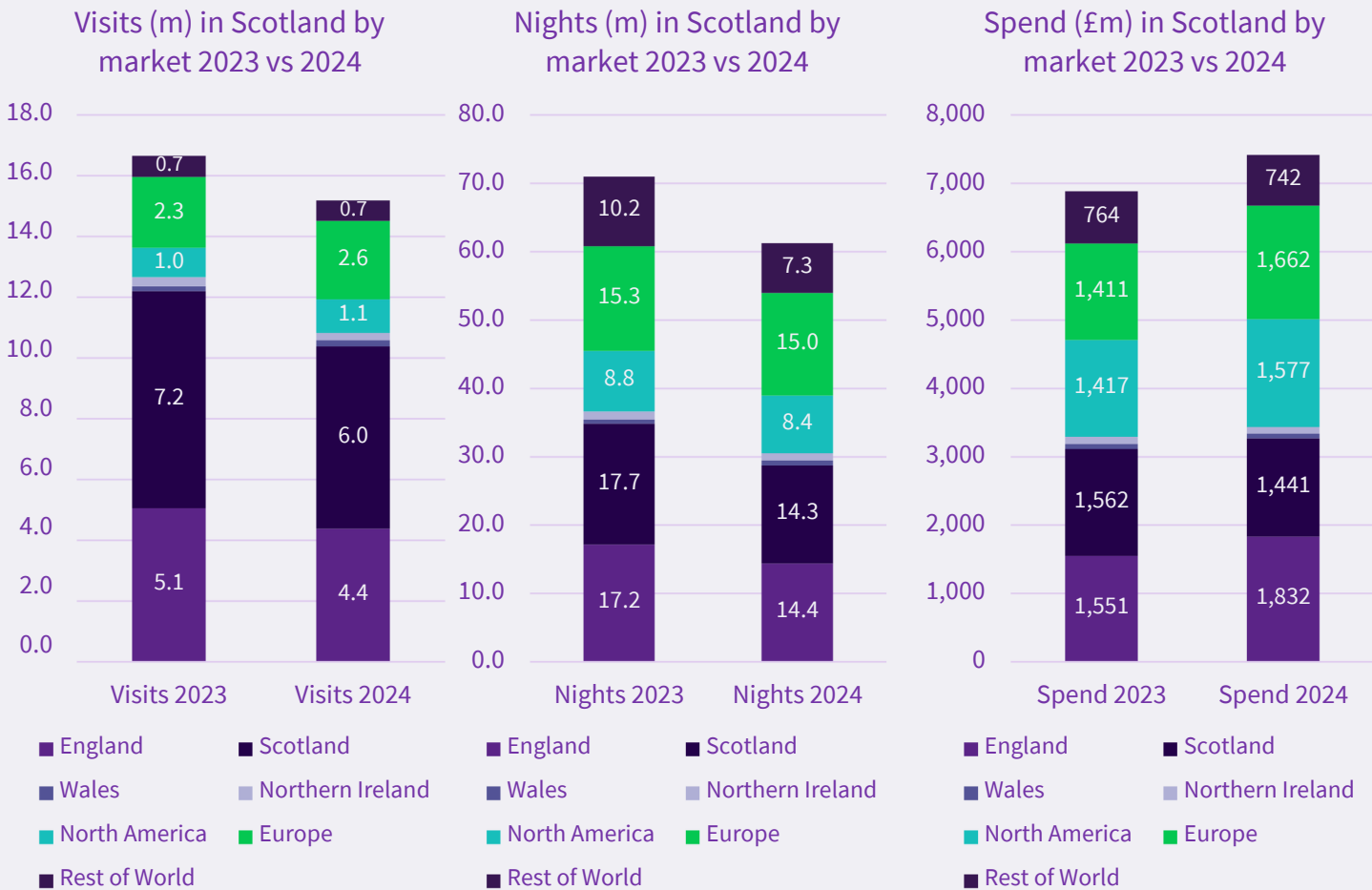
*Please note that average inflation between 2023 and 2024 was 2.5%:[Inflation calculator](#) | [Bank of England](#)

Who Visited Scotland in 2024?

An increase in visitor volume from all international market regions from 2023 did not make up the shortfall from reductions in English and Scottish visitors to Scotland.

Nights spent in Scotland fell across all market regions, with 6.2 million fewer nights spent by Scottish and English residents, and 3 million fewer nights by 'Rest of World' residents.

Cumulative expenditure had increased by 8% from 2023, driven by English, North American and European visitors.



Source: Great Britain Tourism Survey, Overnight Trips (2024), NI Annual Tourism Statistics (2024), International Passenger Survey (2024)

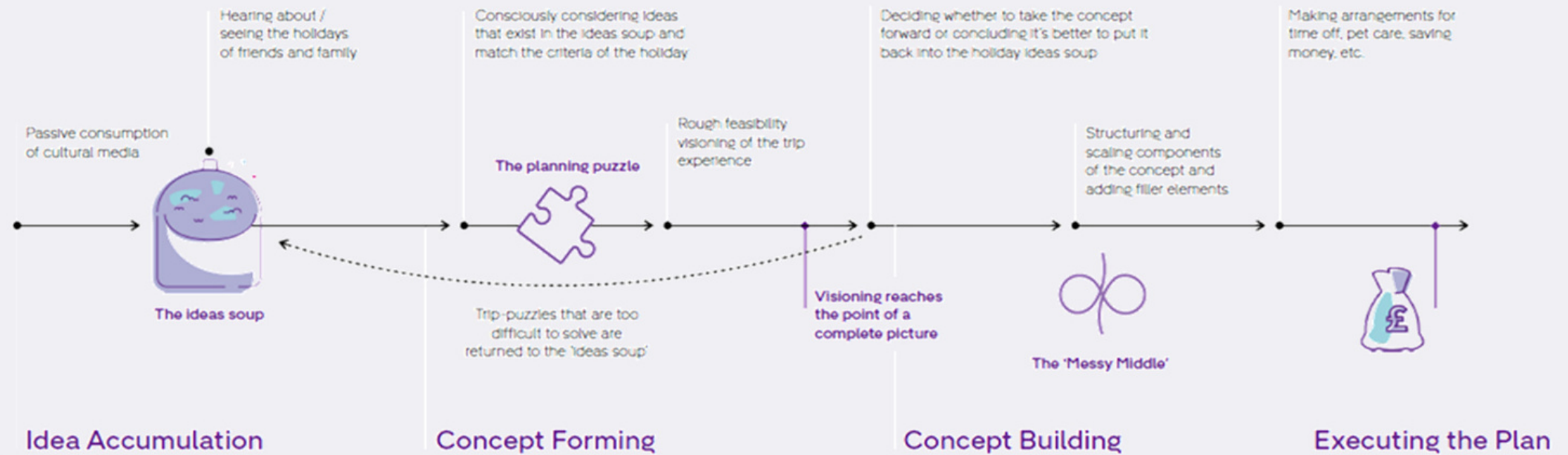
Audiences and consumer behaviour

Scotland continues to perform strongly on the international stage, with strong inbound growth from North America and Europe. Competition in both domestic and international markets remains high, requiring continued innovation to build momentum and stand out in a competitive landscape.

We can't be complacent. We will evolve with authenticity, sustainability, and emotionally resonant storytelling.



The evolving customer journey



Designitresearch: model of stages of the customer journey

Sources of influence

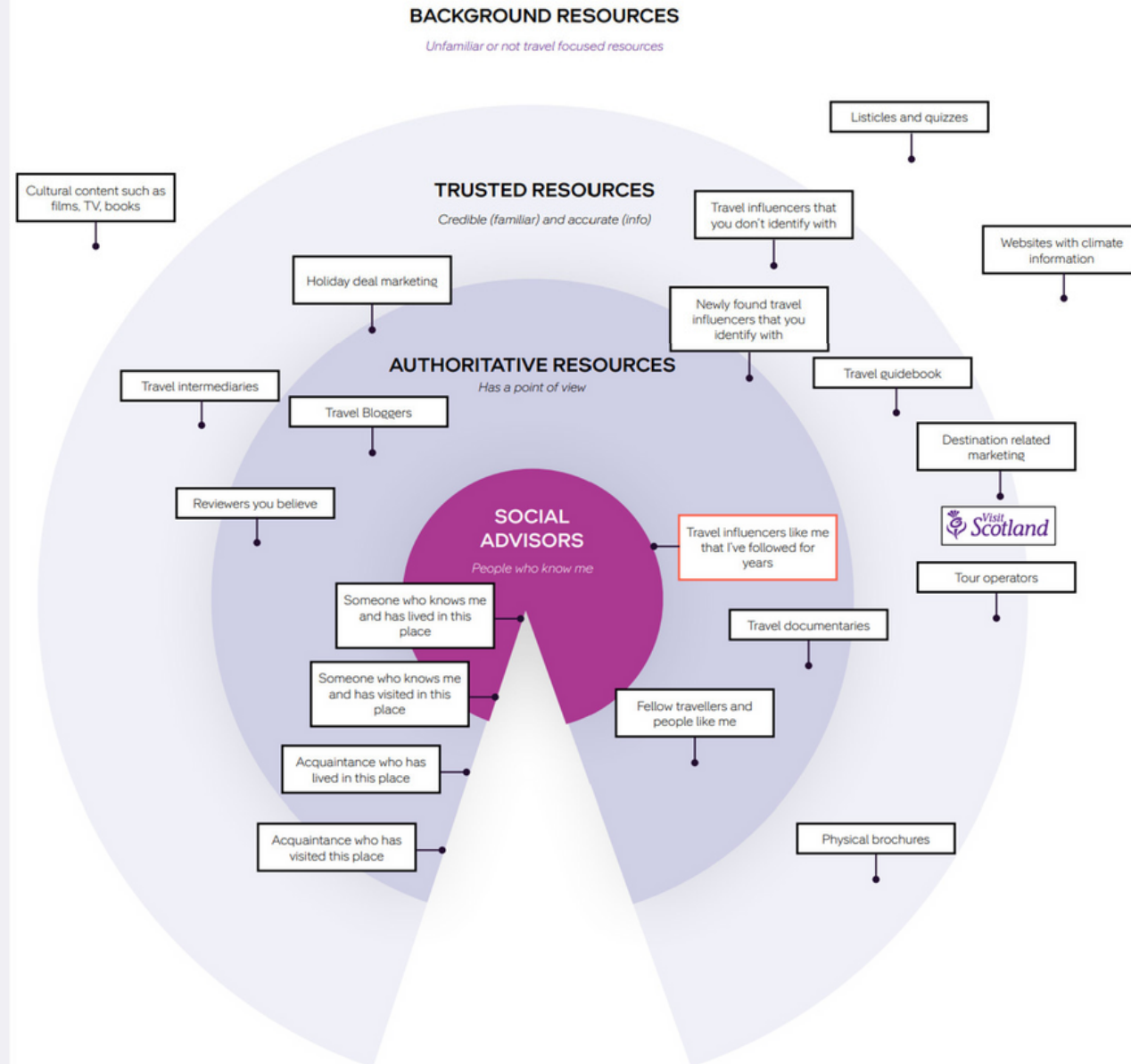
Destination marketing remains credible, accurate and a trusted resource in the trip planning journey. However, other resources carry greater authority and influence.

Cultural media including **TV and film** are more emotive sources of trip ideas and can be the origin point for future travel.

Social media delivers visual, hyper-personalised trip concepts with social proof across the customer journey (inspiration and planning).

Growth in demand for **multimodal media** (editorial content plus imagery, videos and audio).

Travellers have their own trusted suite of **online travel agencies** for booking accommodation and activities.



Digital landscape changes



Social search and in-platform engagement

- **Social search:** Travellers increasingly use platforms like TikTok and Instagram to search for destinations.
- **In-platform engagement:** brands must meet users where they are on social, rather than driving traffic to websites.



Gen AI and personalisation

- **Trip planning:** AI tools are being used to create personalised itineraries and content.
- **Authenticity matters:** AI-generated content must be grounded in real experiences and strong brand reputation & authority
- **Filter bubbles:** Social algorithms can personalise content feeds potentially limiting reach.



Content and media fragmentation

- **Multi-modal content:** podcasts & audio, interactive maps, and immersive video are increasingly effective.
- **Short-form video:** dominates travel inspiration and concept forming stages.
- **Partnerships:** collaborating with platforms and creators who offer scale and data-rich targeting is key.

Our Strategic Approach

Strategic marketing objectives and approach

Building blocks of how we deliver

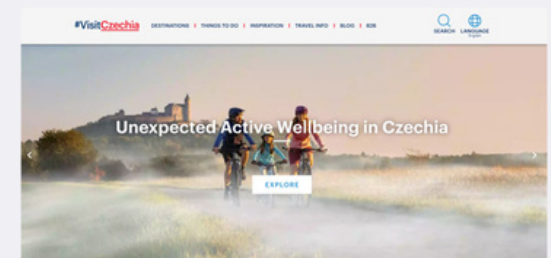
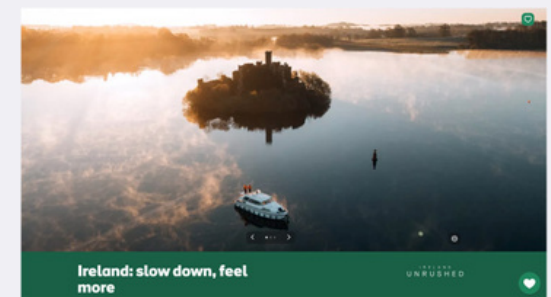
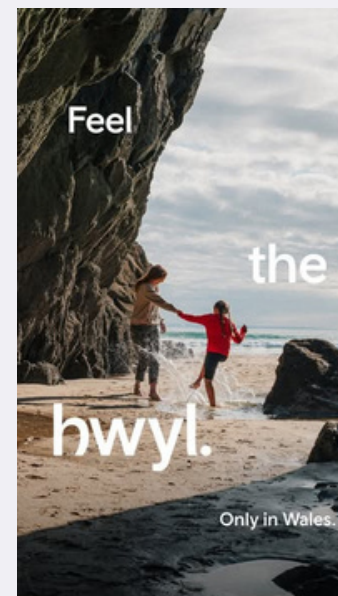
Objectives	Stimulate Global Demand Aligned with the 4S outcomes (Spread, Spend, Sustainability & Satisfaction) Targeting key international markets with sustainable travel experiences.	Boost the Domestic Market Encouraging off-season travel and regional spread. Celebrating Scotland's world-class tourism offering year-round.	
Approach	End-to-End Market & Business Development From product development to route-to-market support.	Full Marketing Capability Integration Leveraging PR, partnerships, social, paid, and owned media.	Smarter, More Targeted Engagement Creative, authentic, and atypical approaches to stand out in a competitive landscape.

A group of four hikers are walking through a dense forest of tall, thin trees. The foreground is filled with a field of purple heather. The text "In Scotland, wellbeing comes naturally" is overlaid on the image.

**In Scotland,
wellbeing comes naturally**

Wellbeing remains a key driver for travel.

Almost all destinations are promoting nature, relaxation, and an emotional reset.



Evolving our proposition

Key driver for travel

Wellbeing; escapism, rest and relaxation,
fulfilment, enjoyment, and connection

Making this distinctive for Scotland

In Scotland, wellbeing comes naturally.

Substantiation

In Scotland, wellbeing is not something we manufacture —it's something we live. It's spiritual, mental, and physical renewal that arises naturally from who we are and where we are.



Core narrative

Scotland, we have no shortage of the real. The profound. The outrageous. Breathe it in. Soak it up. In all it is raw, wonderful, unfiltered glory. Scotland dares you to feel it all. To take you somewhere deeper, richer, wilder, and more emotionally nourishing. What's ours is yours. Come join us.



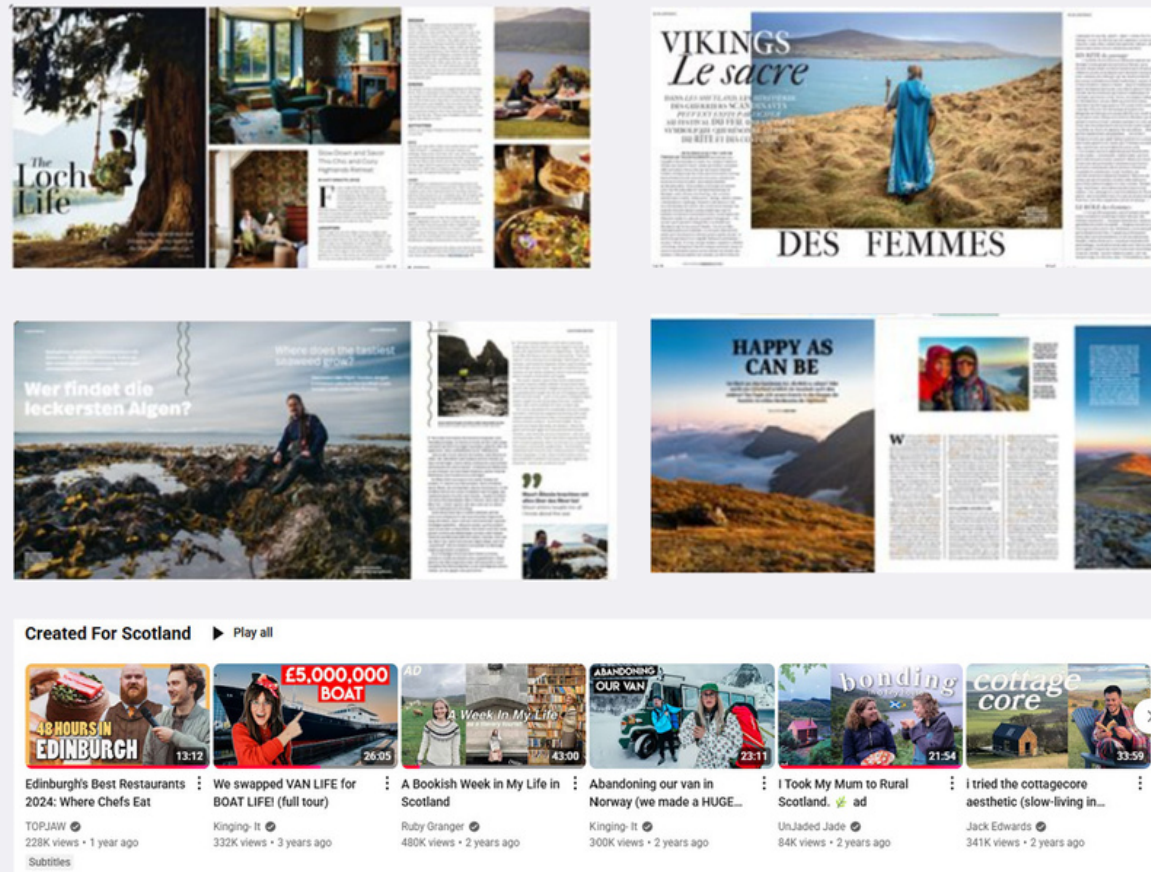
Atypical for the category

- Authentic and refreshing tone of voice true to Scottish traits
- Fewer conventional advertising formats, instead, we'll use immersive partnerships, and an authentic network of influencers
- Candid, playful, conversational, and curated



Building a community of storytellers

- Bringing to life the **authentic story of Scotland** through creation and curation of content
- Harnessing the power of credible and trusted voices through **influencers, partners, advocates, the sector and stakeholders**, to amplify our impact
- Leveraging **right voices** for the right moment, delivering authentic, **first-person lived experiences**



Supporting audiences across the journey

Prospective traveller is passively consuming media...



Idea accumulation

- Social media
- Influencer marketing
- PR
- Media partnerships

...explores holiday ideas and destinations offering those experiences...



Concept forming

- Visitscotland.com
- Content amplification
- Media partnerships

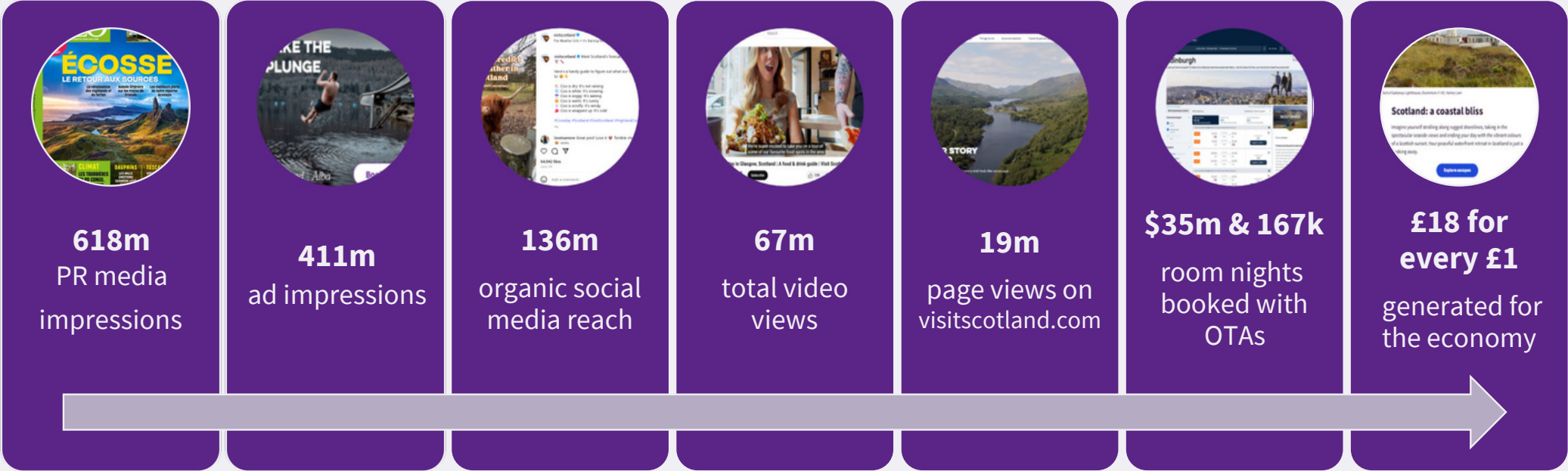
..moves into trip building



Concept building

- Email marketing
- Travel partnerships
- OTA partnerships

Harnessing the power of paid, owned and earned



Core Markets and Audiences

United Kingdom

Objectives:

- To drive sustainable economic growth and business resilience for tourism and events businesses in areas /communities of Scotland with capacity to welcome visitors.
- To increase domestic demand for tourism and events experiences year-round with a particular focus on the offseason (October through to Easter)

Audience: Adventure Seekers, Food-Loving Culturalists, with focus on Families & Retirees

Geo-Targets: London, South-East, North East, North West, Yorkshire & the Humber, Scotland



Total Media Investment
£1.37 million

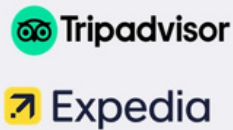


Press and publishing partnerships

High-impact, multi-channel content partnerships

Curated programme of 8+ media group visits showcasing autumn and winter in Scotland across key travel and lifestyle media

Promote the Scottish Thistle Awards with STV, instil pride amongst Scots and encourage nominations



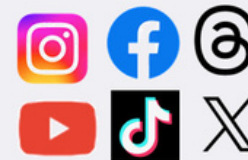
OTA partnerships

Full funnel partnerships to stimulate destination demand and conversion, supporting accommodation, attraction and experience bookings



Partner collaborations

Promote direct connectivity and sustainable travel to and around Scotland, encouraging short breaks & days out.

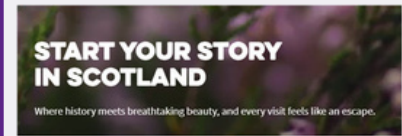


Social media and influencers

Real visitor stories building trust and community.

Paid social content amplification. Influencers sharing Scotland's story in an authentic, relatable way. Content Creators to scale social storytelling.

YouTube development in response to social-search shifts.



visitscotland.com and email marketing

Content and email marketing, reaching 17 markets and covering six languages.

Data-driven digital PR activity around trends.

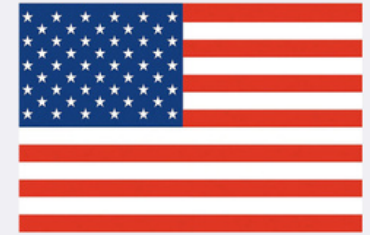
Ongoing promotion of events, rail, ferry and airline partners.

United States

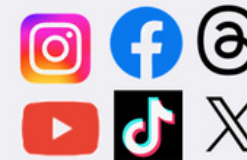
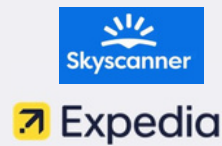
Objective: Drive sustainable economic growth in Scotland through increased tourism - driving demand for A/W + early spring travel from higher spending international markets with seasonal connectivity

Audience: Experience Seekers, diaspora

Geo-Targets: New York tri state, Boston/Mass, California. Secondary: Florida, Washington DC, Chicago, Atlanta.



Total Media Investment
£700,000



Press and publishing partnerships

High-impact TV partnership -
Spotlight Scotland as a luxury

destination in NBC's Extra Mile Club

In-person PR engagement:
Media 1:1s Toronto and New York

Curated programme of 10+ media
group media visits
showcasing autumn and winter in
Scotland across key travel and
lifestyle media

OTA partnerships

Full funnel partnerships to stimulate
destination demand and conversion,
supporting flights, accommodation,
attraction and experience bookings

Promote direct access and new
routes into Scotland for autumn /
winter

Partner collaborations

Promote London and Scotland as
dual destination trip.

Social media and influencers

Real visitor stories building trust and
community.

Paid social content amplification

Content Creators to scale social
storytelling

YouTube development in response
to social-search shifts

visitscotland.com and email marketing

Content and email marketing,
reaching 17 markets and covering
six languages.

Data-driven digital PR activity
around trends.

Ongoing promotion of events, rail,
ferry and airline partners.

France and Germany

Objective: Drive sustainable economic growth in Scotland through increased tourism from our key international markets - driving demand for A/W + early spring travel from higher spending international markets with seasonal connectivity

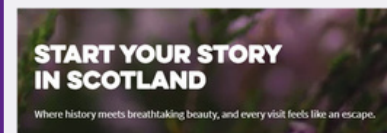
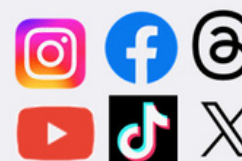
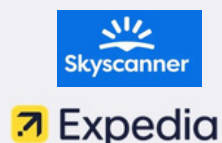
Audience: Experience Seekers **Geo-Targets:** Key city and transport hubs in: •Paris-IDF, Lyon, South-West (Toulouse), North-West (Normandy, proximity with Paris) •North Rhine Westphalia, Bavaria, Lower Saxony, Baden Wuerttemberg, Hesse, Berlin

& Hamburg.



Total Media Investment FR
£420,000 / DE £640,000

LE FIGARO



PR

PR In-person Events:

Media 1:1s

Curated programme of 9+ media group media visits showcasing autumn and winter in Scotland across key travel and lifestyle media

OTA partnerships

Full funnel partnerships to stimulate destination demand and conversion, supporting flights, accommodation, attraction and experience

bookings

Promote direct access and new routes into Scotland for autumn / winter

Partner collaborations

Promote direct connectivity and sustainable travel to and around Scotland, responding to increased EU interest in rail travel.

Social media and influencers

Real visitor stories building trust and community.

Paid social content amplification

Content Creators to scale social storytelling

visitscotland.com and email marketing

Content and email marketing, reaching 17 markets and covering six languages.

Data-driven digital PR activity around trends.

Ongoing promotion of events, rail, ferry and airline partners.

Business support programme

VisitScotland Business Support Hub

<https://support.visitscotland.org/>



Essential tools to help launch successfully including pricing strategies and legislation advice



Deliver quality experiences with customer insights and trends, accessibility and service excellence



Boost visibility through engaging content, social media and marketing partnerships



Develop new products, secure funding and expand with expert advice

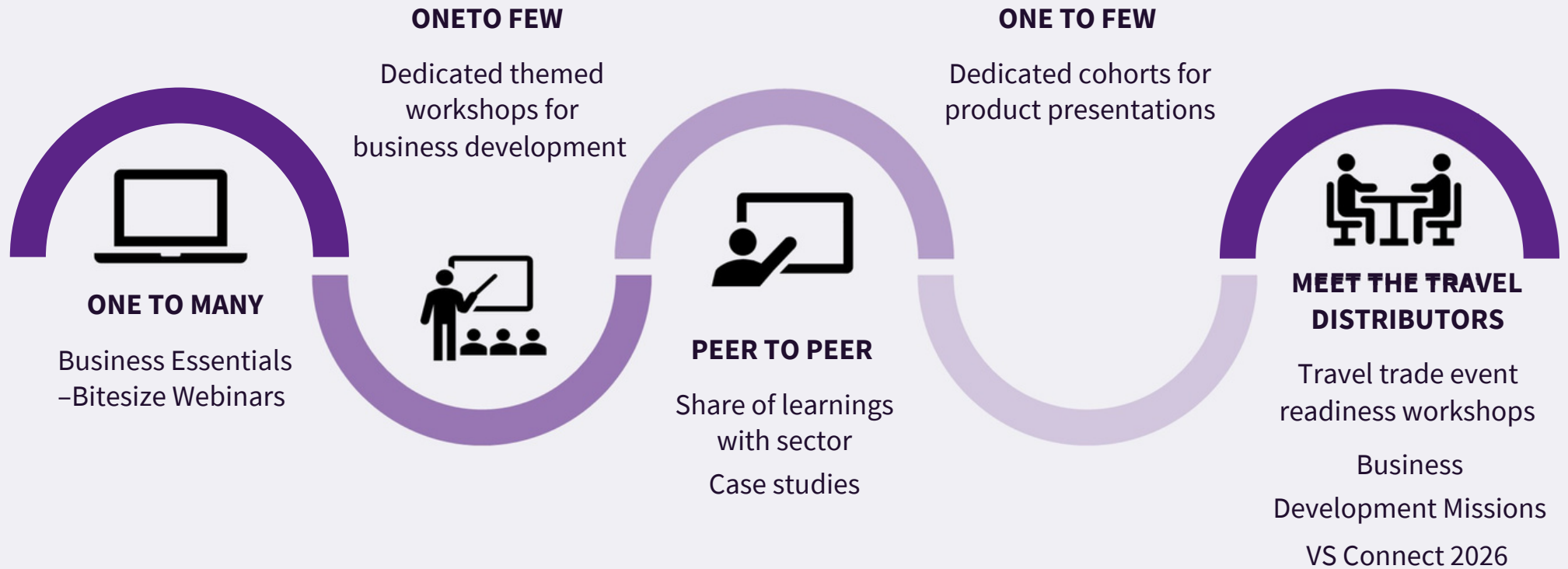


Sustainably grow tourism or events business with actionable green strategies



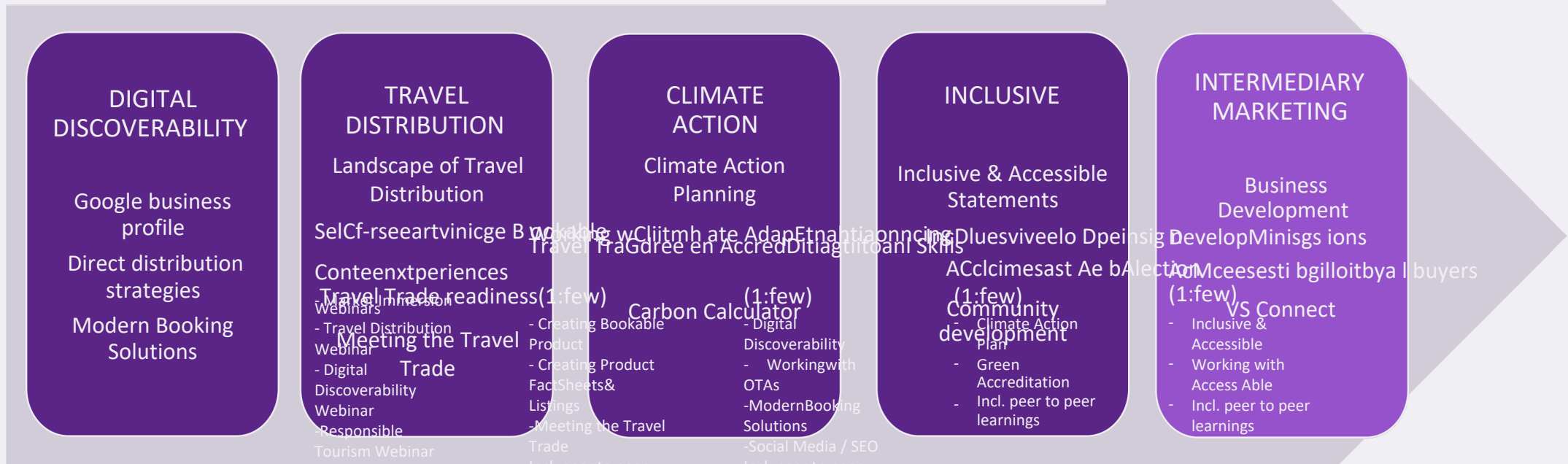
Find tailored advice and case studies for accommodation, active and outdoor, events and festivals, food and drink and visitor attraction sectors and more.

Multi touch points with businesses



Business Development Journey

From early pipeline to maturity –Workshops & Webinars*



*Examples of workshop/ webinars and projects



SolsgirthHome Farm Working

farm with the ambition to drive more visitors and revenue at the time they need it

- • Travel Distribution Workshop
- Product Presentation Day
- Attended Trade Events and hosted fam trips
- On Tourism Cares Map
- Working with a global operator



Radical Weavers

Stirling weaving studio and charity looking to bring in revenue to allow them to continue their community projects.

- Attended at VisitScotland Connect & hosted Fam Trips
- Featured Case Study
- Contracting with travel trade
- On Tourism Cares Map

Paisley Heritage Tours

A social enterprise based in Paisley. Walking tours and heritage experiences looking to drive more visitors and reach new markets. After attending Travel Distribution Workshop

- Trade Product Sheet development
- Hosting Fam Trips
- New to attending B2B workshop & VS Connect



Gallus Pedals

Glasgow based small tour company looking to grow their business and reach new markets. Now successfully working with OTAs including Baja Bikes and Travel Trade.

- Booking engine & digital distribution support
- Attendance at B2B event
- Featured Case Study



How can businesses get involved?



Sign up for our [newsletter](#)



Sign up for [training and events](#)



Browse [advice and support](#)

Visit the [Business Support Hub](#)



get involved

Helping us to help you

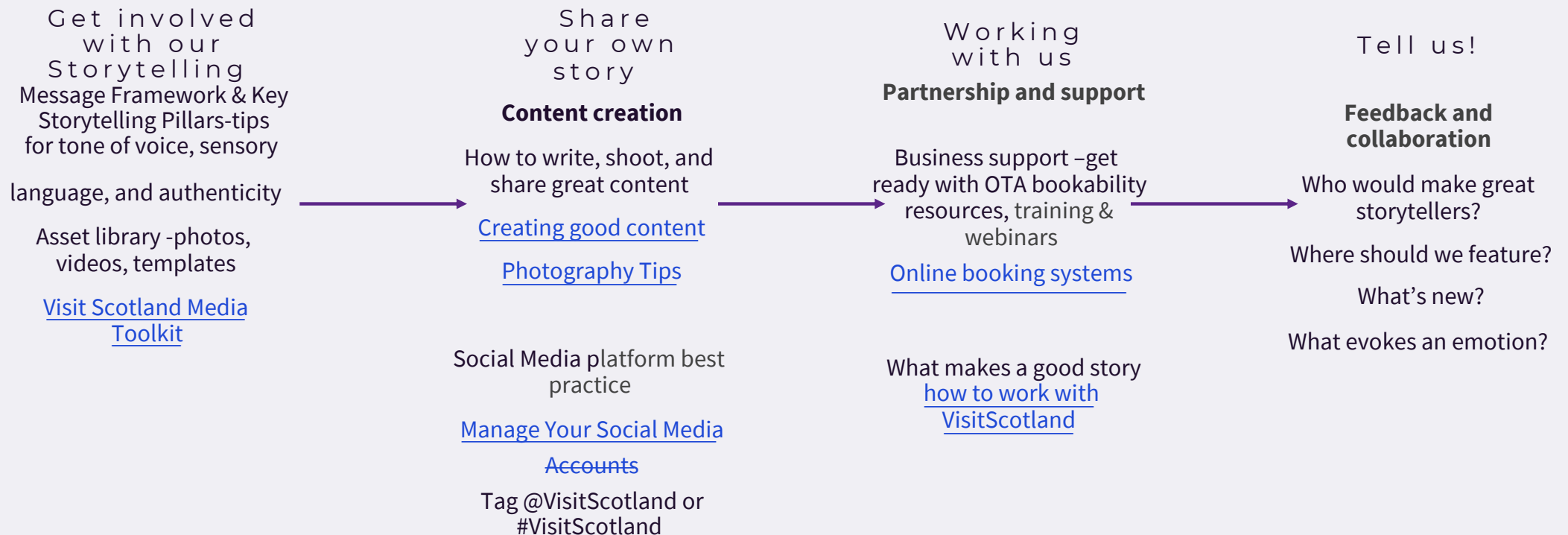
JW1



Month	July/August	September	October	November	December	January
Pathway one – digital channels	Research and Insights	Digital skills		Sustainable & Inclusive	Online booking	Online travel agents
Pathway two – distribution channels	Case studies	Quality experience	Working with travel distribution partners			Sustainable & Inclusive
Pathway three – Events	Intro to the new marketing pathway programme	TBC To include: StPS Action Plan / Environmental Sustainability / EDI / Workforce / Measuring Impacts / Funding				

Email	Fortnightly or monthly (depending on pathway and database).
Social media	Weekly posts across X (Twitter), Facebook groups and LinkedIn as possible.
Partner communications	Monthly updates sent to key partners through existing relationships.
Internal communications	Monthly Hub stories with dedicated page for shareable external assets.
Paid marketing	Lead gen campaign to increase sign-ups.

Help us tell the story of Scotland



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