

SCOTLAND OUTLOOK 2030



Responsible tourism for a sustainable future.



Our shared vision

This outlook towards the future has been developed through a shared vision and strong partnership between the Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise and Skills Development Scotland.

It has been guided by the Strategy Steering Group with representatives from industry, public bodies and the partner organisations.

Over 2500 tourism leaders and stakeholders from Scotland's tourism industry have contributed to its development through dedicated events, workshops and an online survey. A breadth of organisations from local authorities and Destination Management Organisations to business owners, operators and social enterprises have been involved in its development. It has been developed through a strong and equal partnership; its foundations have been built on insights, trends, research and benchmarking.

This is also a continuation of the collaborative approach which was so successfully established as a result of Tourism Scotland 2020 (TS2020).

It marks the end of an in-depth period of consultation, reflection, analysis and collaboration and the beginning of a bold new approach putting our communities, our people, our visitors, our businesses and our environment at the heart of everything we do.

On 4th March 2020, this document was officially launched at the Scottish Tourism Alliance Signature Conference and endorsed by Scotland's First Minister, Nicola Sturgeon.

This marked the dawning of a new era not only for Scotland's tourism industry, but for every person who lives in and visits Scotland.

The time for our industry to adapt has come and this positive change will be led by our vision: Scotland - we will be the leader in 21st century tourism.

Our vision sets our direction, it is ambitious, inspiring, energising and if we are ever in any doubt about where we're heading during challenging times, our vision will refocus us. It is our collective dream. It will be our reality. And it will be a strategy that will benefit all.

This vision will inspire all of our stakeholders – our tourism businesses, suppliers to industry, our government, public sector agencies, our people, future generations; anyone who has any touchpoint with Scotland's tourism industry.

Tourism is acknowledged as having a significant role in delivering Scotland's wider economic strategy as it cuts across every sector and touches every part of Scotland's economy. However, this ambition goes beyond that; it will look to enrich the lives of those who live here and visit us; it will protect and preserve our places, with Scotland's tourism industry acting as pioneers for delivering responsible tourism.

Our current and future challenges are well known to us, however we have many opportunities ahead. We have so much to look forward to in delivering success, not only for Scotland's tourism sector but for our entire nation, creating a better country for us to live and work in, and for the world to visit. We have a vision of every person living in Scotland being inspired by tourism and experiencing the benefits of tourism today and for many years to come.

Our shared vision



SCOTTISH
TOURISM
ALLIANCE

Your voice in tourism matters



The Scottish
Government
Riaghaltas na h-Alba

 Visit
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Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



Skills
Development
Scotland



Scottish Enterprise



Foreword

Nicola Sturgeon MSP
First Minister of Scotland

The world leader in 21st century tourism: that is a vision which is ambitious, brave and bold. But it reflects the country that we want Scotland to be - one that presents our best face to the rest of the world; one that looks forwards and outwards; and one that welcomes all of those who come to visit our fantastic country, whether that is for a few hours from a cruise ship, or touring our more remote corners on the trip of a lifetime.

The Scottish Government's declaration of a climate emergency committed Scotland to tackling its impacts. I am pleased that our collaborative new tourism strategy recognises the vital role the industry has in addressing the climate emergency and safeguarding our breath-taking landscapes and rich heritage for future generations.

These are challenging times, both for the tourism sector and for Scotland as a whole. It means that an innovative, resilient and welcoming industry is vital, not only for Scotland's future prosperity, but for Scotland's place in the world.

Scotland becoming the tourism industry world leader is an ambition I share. Yes it is bold, but I believe there is no country better equipped to rise to the challenge. I look forward to working together to achieve it.



Foreword

Fergus Ewing MSP
Cabinet Secretary for the Rural Economy and Tourism

Tourism has never been more important, both to Scotland's economy and to its wellbeing. And, for the first time, our strategy has been developed in a truly collaborative way - one that reflects the strong partnerships between all the parts of the industry that underpin our success and create a resilience that will allow us to weather even the most challenging of circumstances.

The unique reach of tourism across Scotland, and its valuable contribution to inclusive growth, means that it can be a positive force for Scotland's future – a force that is good for our visitors, our communities, our businesses and for our environment.

This strategy puts people and place at its heart. It not only recognises the value of all of those who work in our industry, but also those who live in communities where tourism plays a key role. It acknowledges the importance of the businesses which deliver those authentic and memorable experiences our visitors seek. We must work hard to retain that authenticity - whether that is through our inspiring culture, our wonderful food and drink, or our unique experiences. Together, we will deliver 21st century tourism for all of Scotland, and we will do it in a way that is sustainable, inclusive and truly Scottish.



Summary

Summary

Scotland Outlook 2030 is a bold new approach that will see tourism act positively in the common interest of Scotland's communities, businesses and everyone who visits and stays with us.

It recognises that the role of tourism has changed as a result of our climate crisis, advances in technology, EU exit and changes in consumer behaviour which is reflected in the demands of today's traveller.

Tourism is no longer just about tourists; it's about people. Success means more than numbers; it's about enrichment and prosperity for residents and our visitors.

Tourism can and will benefit every person who lives in Scotland, visits Scotland and works in Scotland.

That is our vision of 21st century tourism.

Tourism can bring a wealth of economic, social and cultural benefits to our communities, cities and regions, perpetuating growth and stimulating job creation – an upward cycle of economic success. It touches every part of our economy. It is a powerful force.

For all the benefits that tourism delivers, there can be negative impacts as we have seen globally and closer to home more recently.

We are experiencing dynamic change and there is a need now for our tourism industry, government, public sector and communities to collectively respond, adapt and work together to deliver responsible, sustainable and managed growth for the future.

Scotland Outlook 2030 has been informed by a robust evidence base gathered from all partners. This has included significant desk research

from many sources as well as independently commissioned reports. We have captured the learnings from the past and uncovered the future opportunities and challenges. This strategy responds to this evidence in a new way that will maximise the opportunities that we have in our sights in the short, medium and long term. This is a strategy for a better Scotland for all.

From 2020, Scotland will start moving on its path to be the world leader in 21st century tourism. We are bold in our vision, evolutionary in our approach.

We will focus on four key priorities to realise this ambition:

Our passionate people

Our thriving places

Our diverse businesses

Our memorable experiences

We will work as one - our government, industry, private and public sector and our communities to deliver our 21st century vision through a set of measurable commitments.

Our picture of success is one where communities embrace visitors and the stories of our destinations and world-famous assets are brought to life by Scotland's people; where strong partnerships are in play to protect and enhance our environment whilst growing social, cultural and economic wealth.

Summary

Future success will only be achieved through partnership, strong leadership and acknowledgement of the six conditions we have identified as being vital for success:

Digital

Harnessing the power of technology and data.

Policy

Having the right policy and regulatory landscape in place.

Investment

Ensuring we have access to investment.

Connectivity

Proactively investing in the right transport and digital connectivity.

Business network

Providing a strong support network for our businesses.

Positioning

Successful positioning of Scotland and its tourism industry.

This is an outlook to build a 21st Century tourism industry for all – our visitors, people, businesses, communities and our environment.




VisitScotland / Kenny Lam

Visitors to cities are looking for genuine experiences and the future of tourism is rooted in authenticity. Increasingly, tourists want to live like locals and Glasgow's appeal as the heartbeat of contemporary Scotland will contribute to our ambition to be a world leader in 21st Century tourism.

Susan Deighan, Director of City Marketing and External Relations, Glasgow Life

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21st century Scottish tourism is about harnessing the potential that tourism has and does deliver. It's about tourism continuing to be the engine that drives positive change and enriching the lives of all those who visit us while ensuring that the benefits it brings are also felt across the whole of Scotland. It is about the experiences that we develop and continue to deliver responsibly and in a sustainable way for many years to come. 21st century Scottish tourism is also about inclusivity and when delivered together in partnership each and every person who lives and works in our wonderful country not only benefits from it but feels immensely proud about being part of it.

Marc Crothall, Chief Executive of the Scottish Tourism Alliance and Chair of the Strategy Steering Group

Context

A time for change

The landscape of the global tourism industry has changed.

EU Exit and a challenging global economy are now part of our landscape and both could have a significant impact on our visitor markets. Decisions on where we visit, when we go and what we can afford to do as part of that visit are being given more careful consideration than ever before.

The way people travel and stay has also changed. Online Travel Agencies, the rise in the collaborative economy, and the popularity of platforms like Airbnb, have radically changed and challenged the traditional model of tourism. Increased international connectivity, and the popularity of low-cost budget travel creates opportunities for Scotland, but also underlines the importance of maintaining our competitiveness.

Scotland has for the first time in the last few years experienced the global phenomenon of high visitor volumes in certain areas, driven by social media, which can create pressure on infrastructure, with negative impacts on local communities and widespread reporting of that in the media. The potential for future introduction of visitor levies by some of Scotland's Local Authorities will require careful and sensitive implementation, to ensure they support Scotland's tourism offer.

EU Exit, and the UK Government's migration policy, could have a significant impact on our workforce, and on our tourism businesses' ability to recruit the workforce they need.

The way people travel, visit, explore and experience destinations globally will continue to change and we know with absolute certainty that the patterns and trends of today's tourism market

will have changed again within the next ten years. We can't predict the future of course, but we can draw on today's insights and yesterday's lessons.

The climate emergency is starting to change the way we think about where we travel and stay, how we get there and the impact we have on our global environment and the destinations we visit.

Our core markets – particularly the domestic market – will remain important; new markets will emerge; and we will continue to build on our competitive and unique strengths that we have across all of our assets. Our Landscape and Scenery, Heritage and Culture, People and Welcome, Activities, Events and Festivals and Business Events will continue to draw visitors to our shores.

Our world continues to change and evolve and with change comes opportunity, challenge and responsibility.

There are a number of key factors which will influence the long-term growth, development and success of Scotland's tourism industry.

Our environment

Climate change presents the biggest threat to our society as we know it today.

It is estimated that, globally, tourism contributes around 8 per cent of carbon emissions¹, coming from aviation, transport, accommodation, activities, the growing number of travellers, consumption and waste.

Overcrowding and the impact on destinations, communities, nature and the environment has become a global phenomenon. While tourism has contributed to our climate emergency, it has

¹ The carbon footprint of global tourism – 2018: Nature Climate Change

Context

also become vulnerable as a result and we must now take purposeful action to halt further decline, reverse damage and bring about long term change.

Collectively, we have the opportunity and the power to act as pioneers for transformative change across Scotland's tourism industry. It is incumbent on us to do so and central to our vision of being the world leader in 21st century tourism.

Scotland is transitioning to a net-zero emissions country for the benefit of our environment, our people, and our prosperity and we have gained respect for our ambition and leadership on climate change.

Our world-leading climate change legislation sets a target date for net-zero emissions of all greenhouse gases by 2045. Scotland's contribution to climate change will end, definitively, within one generation.

Impact of technology

Technology has become intertwined with every aspect of tourism. It gives us information and choice. It is an essential part of how a traveller researches and books a trip, experiences a destination and shares that with the world.

Big data gives us opportunities to be smarter in the way we market our assets, move people around our destinations, create authentic, individual experiences and predict the future as much as we can. Virtual reality enables us to give our visitors a taste of what to expect; it inspires confidence and brings them into our world before they arrive.

User generated content is integral to destination marketing. Emotional connections with products, people and place are being made in the digital world and visitors can now get a taste of what Scotland might be like to visit before arriving,

through new advances in technology. Automation technologies are already disrupting many aspects of our tourism sector and with the increase in new technologies comes greater need for businesses in every part of Scotland, particularly in our rural areas to be better connected digitally.

Tomorrow's traveller

Changes in technology, society and consumer behaviour have resulted in new traveller attitudes and behaviours.

We have moved from a world where demographics gave us our insights to a place where we look to connect to our audiences of visitors on the basis of their values, needs and behaviours.

Today's traveller looks for immersive experiences and limitless discoveries where they can experience a different way of living for a short time in a new place.

Digital relationships and connections have become more important to groups of travellers looking to share their experience of being 'well-travelled' in their pursuit of digital and social reward. The demand for 'must have' experiences will continue, as will 'needs must' travel within the business travel market.

In light of the climate emergency, "overtourism" in a growing number of global destinations and geopolitics, ethical travel has risen in prominence with travellers making decisions based on conscience and perceived impact.



Opportunities

Opportunities

Tourism as a positive force

21st century tourism? Tourism is changing. A new model is emerging.

Sustainability, responsibility, innovation and technology already are in many destinations the driving forces that are influencing decisions on the new ways of providing the visitor with the experiences they are looking for.

Our visitors

Scotland's famous welcome, the images of our assets on screens around the globe, our world class events and marketing successes draw increasing numbers of international visitors to Scotland each year. In 2018, there were over 15.5 million overnight visitors to Scotland, spending almost £5.1 billion. This includes over 3.5 million visitors from overseas. Our core markets are unlikely to change and we need to act now to align our tourism offering with what our market intelligence tells us about our emerging markets to allow us to capitalise on new opportunities on the horizon.

Sustainable growth

In the coming years, the sustainability of our assets, the social contribution and economic benefits of tourism will be critical to tourism's success. This strategy will be delivered against the backdrop of a climate crisis which will ultimately change everything we do.

We are transitioning as a nation to a net-zero society and our industry must be reflective of this ambition in our thoughts, decisions and activity.

We have the opportunity to differentiate ourselves as a destination by focusing on all aspects of

sustainability, from the care we will deliver back into our destinations, the commitment to our green agenda and the support for our near and wider environment. This is central to our vision of being the world leader in 21st century tourism and will ensure a better quality of life and experience for all generations who live in and travel to Scotland.

Sustainable growth is about increased value for all.

Tourism's economic contribution

The tourism industry is a cornerstone of the Scottish economy - it plays a positive role in every region of Scotland.

In 2018, spending by overnight tourists and day visitors in Scotland was around £10.4 billion. This generated around £12 billion of economic activity in the wider Scottish economy and contributed around £7 billion to Scottish GDP.²

The sector is an integral part of many other sectors and industries across Scotland, such as food and drink and transport and provides an important route for Scotland to increase its international profile.



² VisitScotland (2019), Key Facts on Tourism in Scotland, 2018.

Opportunities

Attracting Investment

Tourism is the 'shop window' for the world to view Scotland. It can show the very best of what we have to offer not only as a travel destination, but as a country to invest and do business in. Scotland is the UK's most attractive destination for foreign direct investment projects after London³ and a 21st century tourism industry can act as a lever for increased inward investment. The positioning of our brand, 'Scotland is Now', the way we market ourselves to the world and the quality of visitor experience we deliver can positively influence global investment in an intensely competitive environment.

Job creation

Tourism is an important employer with 218,000 people working in the sector in Scotland – over 8 per cent of the workforce⁴, or 1 in 12 jobs in Scotland's economy. Employment in the tourism industry has grown by almost 33,000 since 2011⁵ and there are over 14,000 tourism businesses in Scotland. Over 10,000 of these businesses have fewer than 10 employees.⁶

In 2018, the sector represented 15% of total employment in Argyll and Bute, 13% in the Highlands, and around 10% in Edinburgh. The sector is the largest provider of employment in 16 out of 32 local authorities.

Tourism touches every part of Scotland's economy and is a driving force for job creation across our communities. By creating quality jobs with the right pay and conditions, we have huge opportunities to grow employment within the tourism sector, with our tourism businesses becoming fair work and responsible employers.



A career of choice

Tourism is a career of choice for many, with numerous rewarding opportunities existing across a diverse range of businesses and sub-sectors. There is already a wealth of good practice happening across our industry that can be shared. However, the perception and indeed reality of poor conditions and low pay needs to be overcome to deliver a world class tourism product and our vision of 21st century tourism.

53% of employees in tourism earn less than the real living wage, compared with 17% of employees in the economy overall.⁷

Tourism will continue to grow as a sector and it is vital that our industry attracts, trains and retains the size and quality of workforce needed to fulfil our needs and ambition.

EU Exit has the potential to create significant challenges for the sector. EU nationals make up

³EY FDI report from 2018

⁶Scottish Government (2020) Growth Sector Database.

⁴Scottish Government (2020) Growth Sector Database.

⁷Scottish Government (2019), Annual Survey of Hours and Earnings 2018.

⁵Scottish Government (2020) Growth Sector Database.

Opportunities

a larger share of the sector's workforce (11.5 per cent) than the economy overall (5.3 per cent)⁸. The UK Government policy on migration will have a significant impact on the future recruitment of key tourism roles as many of these are likely to fall below suggested salary and skills thresholds for external recruitment. All of this points to the need for a well thought out employment strategy with the right balance of home-grown talent development and international expertise.

It is more important than ever that education from early years and training reflect the skills required to meet changing tourism trends, raise productivity within the sector and ensure that Scotland's tourism industry is able to deliver its 21st century vision through sustainable tourism practices across the sector.

Tourism offers vast, meaningful and exciting opportunities for our future and existing workforce. We have the opportunity to excite new generations, drawing them into our sector to deliver tomorrow's visitor experiences through creativity, innovation and authenticity.

We can build a strong, proud and passionate tourism workforce in Scotland.

Collaboration between our partners and stakeholders across the sector will see the development of sustainable career pathways and tourism becoming a career of choice rather than a default sector.

Communities

Continuing to engage our urban and rural communities is an essential part of the development of our destinations and tourism offering. The voices of the people who live

in our destinations must be heard and their needs understood and accounted for in tourism development and policy decisions.

Our future approach is about shared value to ensure that the benefits of tourism are experienced directly by our communities and that our visitors enjoy enriched experiences delivered by proud and passionate people who live and work in Scotland's destinations.

The changing way we manage our destinations

Today's traveller has more information available at their fingertips than ever before and their research of a destination now spans many digital channels.

Authenticity is high on the list of visitor demands. This is reflected in the personalisation of local marketing and information and experiences relating to a destination being brought to life through storytelling and people, both on and offline to get a real sense of expectation and excitement.

Residents have now become as important to a destination as visitors, with the role of the Destination Management Organisation (DMO) becoming increasingly focussed on actively engaging local residents in the management, development and promotion of that area. Many DMOs are at the heart of collaborative working across Scotland's regions.

Destinations all have their own unique needs, offerings, priorities and challenges. There are many different structures that operate within a destination to bring about increased collaboration between businesses and residents and create healthy and sustained economic growth for each area.

⁸ Scottish Government (2019), Non-UK Nationals in Scotland's Workforce.

Opportunities

Destinations are about people, with locals being at the heart of these assets, delivering immersive experiences and communicating that unique sense of place to Scotland's visitors.

Encouraging visitors across Scotland

We know that today's traveller is looking for more; to do more, see more and have new adventures and experiences beyond our famous cities and landmarks. To experience limitless discoveries through our destinations, people, culture, heritage, nature, food and drink and events. One of our USPs is our size – visitors can come here and enjoy a wide range of experiences and destinations in a single trip which is good for all who come here, our businesses and our communities.

Our insights tell us that we have even more opportunities to uncover, showcase and move visitors around all of Scotland's assets creating memorable experiences for all types of visitor to enjoy, talk about and share.

Collaboration and partnerships

One of the biggest successes of Scotland's tourism industry has been our ability to deliver a shared vision collectively. TS2020 was perhaps the strongest example of that. The strength of partnership that exists on a local, regional and national basis between public and private stakeholders is key to delivering success; this ambition and approach is reflective of that and builds on a great many achievements to date. A shared vision between our industry, public and private partners and our communities will see further development of healthy, profitable partnerships that protect our places while delivering experiences for people from all over

the world to enjoy, share and remember.

Each one of us has a role and we all need to play an active part in managing and mitigating the impacts of tourism to ensure the long-term sustainable growth of our tourism product and the creation of benefits that can be enjoyed by everyone.

21st Century Tourism is about harnessing the coordinated efforts of the tourism industry to meet both the climate challenge we face and the needs of travellers in Scotland. Together with our people, businesses and communities, we will work positively to deliver high standards of experiences and service, and make the investments needed to address climate change.

**Claire Bruce, Owner,
Glen Tanar Estate**



Vision

Vision

Scotland - we will be the world leader in 21st century tourism.

What is 21st Century Tourism?

21st century tourism is about creating sustainable growth with everyone playing an active role.

It's about purpose and profit in equal measure, protecting people and place.

It's about inclusion.

Scotland will be the world leader in 21st century tourism. We are already known and recognised globally for our joined-up approach in delivering our tourism strategy and have become a case study for how businesses, communities and governments around the world should collaborate.

We look for better ways of doing things and as a nation we are of course already world leaders in innovation – it's in our blood, our DNA and it's the nature of how we respond to opportunities and challenges.

We have the strength of spirit that will enable us to lead the way. We will influence others to do the right thing and we will act by taking the right steps.

21st century tourism is about collective ambition, working together across all sectors and destinations with a strong, shared vision. It's about creativity, innovation, care for the environment, our people and future generations.

21st century tourism is about being brave, outward looking, forward thinking, responsible and putting our communities, people, visitors, businesses and environment at the heart of everything we do.

Our vision of 21st century tourism is about making Scotland, and our world, a better place for everyone.

Our mission

Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.

We'll achieve our vision by working together, driven by our mission.

Tourism is driven by pride. Pride in our identity, our places, experiences, our people and businesses.

We will deliver our mission with all of our partners and stakeholders working in collaboration to bring the right visitors to our shores and provide unique, quality experiences which they will share with the world. We understand the strength and capability of our collective ambition to deliver better socio-economic conditions for communities across Scotland.

We will educate and inspire people to become part of our industry and look to build our distinctiveness and USP within the global market, increasing our competitiveness by pursuing sustainability.

Working together, we can improve the quality of our experiences by improving our infrastructure, facilities and services and create the right conditions for further growth and investment.

We'll build on our marketing successes and the way we connect with our audiences with improved knowledge, data and an understanding of who they are. Innovation will be at the heart of our activity to ensure that we showcase all of Scotland's assets to visitors and shine a light on all of our destinations.

Vision

Collective, positive action will ensure that we have the right conditions to deliver our mission, with tourism acting as a positive force.

We are more conscious than ever of the need to grow a sustainable tourism product for the future, working with communities to minimise the potential negative impacts of what ‘success in numbers’ has looked like.

This set of commitments will deliver our aims for a sustainable future.



VisitScotland / Kenny Lam

The context

Tourism represents a significant consumer of energy and producer of waste, and Scotland’s tourism sector recognises that it has a key role to play in addressing this. Therefore it is important that we all take a consistent and sustained action to reducing our environmental impact.

It is important that tourism brings net benefits to communities across Scotland, for example by contributing to Scotland’s events, heritage and cultural sectors that local people can also enjoy. Communities should have a say in the way that the tourism evolves locally, and be reassured that tourism-related concerns are dealt with, as and when they arise.

For the tourism sector to make its full contribution to Scotland’s economic success, it is important that the impact of visitor spending is spread more evenly across the country. Strengthening the economic sustainability of Scotland’s tourism sector also requires careful prioritisation of resources in the right places.

Our commitment

Scotland’s tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045.

We will ensure that tourism leads to improved community wellbeing and nurtures thriving places across Scotland.

We will ensure the value of tourism to Scotland’s economy continues to increase, and delivers shared prosperity for all, by encouraging the right growth in the right areas.



Four key priorities

Our passionate people

We will attract, develop and retain a skilled, committed, diverse and valued workforce.

Our picture of success

Our people make an enormous contribution to our businesses, industry and Scotland's economy and do so with great pride. We will continue to reward them, recognising talent and create quality jobs with good pay and conditions across our industry.

Our industry will become more attractive as a result. People will see the sector as offering valuable career opportunities that will allow new generations to make the best of their skills and talents.

Our industry will be known for fair work, exciting opportunities and supportive workplaces with a workforce that more closely reflects the population of Scotland.



21st Century Scottish Tourism will be seen as a force for good by everyone in Scotland. People of all ages and backgrounds will aspire to work and build a career in the sector and will be welcomed, valued, supported and treated fairly by their employers.

Lawrence Durden, Tourism Industry Manager, Skills Development Scotland

Our passionate people

This is the set of commitments that we will deliver against this priority.

The context

Our commitment

Scotland's tourism sector workforce supply is under pressure, and will continue to be put under further pressure by a range of factors including demographic change and the impact of increased migration regulations, which further exacerbate existing skills shortages. Major changes are required in order to change perceptions of working in tourism and reach new sources of potential employees and entrepreneurs in order to ensure that the sector can thrive in the long-term.

We will ensure that Scotland has sufficient people to create an outstanding workforce, ready to meet the requirements of the 21st century workplace.

By 2025 Scotland aims to become a leading Fair Work Nation, where fair work drives success, wellbeing and prosperity for individuals, businesses, organisations and society. By adopting Fair Work practices, Scotland's tourism sector will be better placed to recruit and retain employees who feel valued for the contribution they make.

We will support and enable the adoption of Fair Work practices in Scotland's tourism sector.

Training and education in tourism must be highly responsive to changes in demand for skills in the tourism sector. By showing clear paths for career development and providing training that allows people to advance in their career, Scotland's tourism businesses can be more innovative and successful in the long-term.

We will continue to encourage career development by improving opportunities for career mobility.

By welcoming people from all backgrounds and ensuring the right conditions for them to thrive, Scotland's tourism sector can become more competitive, innovative and truly reflective of Scotland's population.

We will actively champion diversity across the tourism sector, so that it reflects a modern Scotland.



Scotland is special to the people who live, work and study here and to our visitors who come to meet the locals and share in our wonderful places and experiences. 21st Century Tourism will cherish and protect what makes Scotland special and ensure that our tourism industry creates a sustainable future with benefits for all.

**Anna Miller, Head of Tourism,
Highlands & Islands Enterprise**

Our thriving places

We will create and develop a sustainable destination together.

Our picture of success

Tourism will be recognised nationally, regionally and locally in our communities as a positive force.

People all over Scotland will feel the benefits of tourism and understand the part they play in creating our thriving communities and delivering a visitor experience that is shared the world over.

Everyone will have a responsibility for managing the impact of tourism on our environment and we'll work together to ensure that the right


growth happens in the right areas, benefiting our businesses and communities.

Our places will be better connected physically and digitally to allow all of our visitors to discover, experience and share all of what Scotland has to offer.

Our natural assets – our landscape, scenery, natural and built heritage will be cared for, protected and invested in for our current and future generations to experience and enjoy.

This is the set of commitments that we will deliver against this priority.

The context	Our commitment
<p>Managing tourism responsibly requires sustained collaboration and planning among a wide range of stakeholders, and we need to seek new ways of working together. With guidance and support, the existing governance and funding structures for tourism management at local level will need to evolve to meet new challenges and opportunities.</p>	<p>We will ensure places across Scotland can develop and manage tourism effectively and responsibly.</p>
<p>Scotland's communities will benefit from a 21st Century approach to tourism. They should therefore be recognised as a key stakeholder in tourism related planning, and be able to develop tourism in harmony with the local social and economic environment.</p>	<p>We will actively engage local communities as valued stakeholders in tourism development and delivery.</p>
<p>To achieve inclusive, sustainable growth for Scotland's economy, it makes sense to strengthen the links between tourism and other key sectors. It will also be increasingly necessary to target resources towards encouraging the right growth in the right areas.</p>	<p>We will enable the whole of Scotland and more sectors of the economy to benefit from tourism demand, by taking a strategic approach to developing the right products in the right places.</p>

A scenic view of a coastal airport. In the foreground, there is a large patch of tall, golden-brown grass. A paved path leads towards a sandy runway where a small, white propeller plane is parked. Three people are walking away from the plane towards the right. In the background, there are rolling hills and a body of water under a blue sky with scattered white clouds. A large, semi-transparent blue trapezoidal shape is overlaid on the middle of the image, containing white text.

It's tourism that underpins the future of our islands, that contributes to our communities that sustains our heritage and way of life. It means all of us embracing a shift in mindset from value to values.

**Rob McKinnon, Chief Executive,
Outer Hebrides Tourism**

Our memorable experiences

We will provide the very best, authentic and memorable experiences.

Our picture of success

We will provide a wide range of immersive, responsible and authentic visitor experiences that reflect our strengths and changing visitor trends. Every visitor expectation will be met, with each visitor enjoying a world-class experience creating ambassadors for Scotland all over the world.

Our visitors will stay longer throughout the year, see more of Scotland and spend more during their visit.

We will make seamless journeys possible and create barrier-free stays that are accessible to all.

This is the set of commitments that we will deliver against this priority.

The context	Our commitment
Consumers are increasingly connected, informed and keen to get the most from their visit with high-quality, memorable experiences. By connecting visitors with outstanding experiences that are authentic to the place they're visiting, we can increase the value per visitor while contributing to thriving places across Scotland.	We will nurture Scotland's tourism assets to deliver high quality, memorable experiences that benefit visitors and the places they visit.
We can help visitors to explore more of Scotland if we give them the tools to do so: user-friendly transport options, as well as routes and itineraries that help them to discover the full range of experiences that we can offer. This will require improved collaboration between Scotland's destinations, as well as enhanced planning and coordination between the tourism sector and transport operators.	We will encourage and enable visitors to explore more of Scotland throughout the year.
Being a leader in 21st century tourism means ensuring barrier-free travel throughout the country, with the information and infrastructure available to help all visitors to enjoy what we have to offer.	We will ensure Scotland is an inclusive and accessible destination, enabling all visitors to travel widely and enjoy the full range of the country's visitor experiences.

A scenic landscape of a Scottish highland. In the foreground, a dark asphalt road curves through lush green hills. In the background, a large, rugged mountain range with steep, rocky cliffs and green slopes stretches across the horizon under a cloudy sky. A large, semi-transparent blue text box is overlaid on the middle of the image.

21st century Tourism must mean more than simply a change in narrative. It recognises, responds to and balances the interests of residents, visitors and businesses. Our potential prize? Tourism playing its part in delivering opportunity and benefit across all of Scotland, and contributing to solutions to some of our biggest challenges.

**Paul McCafferty, Team Leader,
Place, Scottish Enterprise**

Our diverse businesses

We will build business resilience, sustainability and profitability.

Our picture of success

Our businesses will thrive in a supportive environment, adopting responsible and fair business practices whilst being open to change and committed to investing in their future.

Businesses will have a stronger capability to secure appropriate investment which will be reflected in the productivity of the sector, showing positive improvement, growth and improved financial returns.

We will see all businesses able to embrace innovation and technology to create and deliver new and better visitor experiences in line with the changing landscape and consumer behaviour.

Our businesses will demonstrate visible leadership through increased collaboration,

building sustainable and resilient business practices, investing in their people and future success.



This is the set of commitments that we will deliver against this priority.

The context	Our commitment
<p>The long-term economic sustainability of tourism in Scotland depends on businesses being able to capitalise on emerging trends, and changes in the world around them. To help them do this, Scotland's tourism businesses should be able to meet and learn from each other, and benefit from the right guidance and support when they need it.</p>	<p>We will support tourism businesses in Scotland to become more entrepreneurial, agile and resilient.</p>
<p>Scotland's tourism businesses will ensure that we become a world leader in 21st century tourism by improving their environmental, social and economic impact. A combination of guidance, support and incentives will help us to deliver on this commitment.</p>	<p>We will establish measures to help Scottish tourism businesses commit to sustainable practices.</p>



ride

Building on the wonderful heritage brand that already exists, innovation must be at the core of the approach to tourism going forward. If Scotland is to be the world leader in 21st century tourism, we must continue to develop and deliver an innovative, visionary, and fully sustainable offer that doesn't react to demand, but proactively and creatively anticipates the aspirations and needs of future visitors, whilst protecting and enhancing communities throughout Scotland.

Fiona Campbell, Chief Executive, The Association of Scotland's Self-Caterers (ASSC)



Six conditions for success

Our six conditions for success

For us to achieve our vision, we must work in partnership to bring about the right conditions for success and tourism must be elevated to a policy priority level.

We have the opportunity to build on our collaborative successes with a common agenda and deliver our 21st century vision.

We have achieved much, but change must happen now and can only do so with supportive policy in place.

We have identified six conditions for success.

Digital

We must harness the power of technology and data to understand new markets, our audiences and consumer behaviour within a changing landscape and bring our visitors closer to us in every way.

Policy

The potential contribution that tourism can deliver must be understood and acknowledged with the right policy and regulatory landscape in place to support our vision of 21st century tourism.

Investment

Access to public and private investment will see our industry growing through innovation and development; finding new and better ways of doing things that improve the attractiveness of our tourism product globally.

Connectivity

Focussed effort and investment to improve Scotland's transport and digital connectivity will ensure that every visitor who chooses to experience Scotland will do so seamlessly, enjoyably with the ability to share instantly with the world.

Business network

Our businesses will be supported through a stronger cross sector network to improve collaboration, efficiency and to deliver greater value back into Scotland's economy.

Positioning

Scotland's tourism industry will shine both within our own borders and internationally, attracting visitors and new generations of our workforce.



VisitScotland / Kenny Lam

21st century tourism is connecting the whole of Scotland as a global tourism destination

Karen Yeomans, Director Growth & Investment, North Ayrshire Council

Supporting the implementation of Scotland Outlook 2030

We have also identified a set of commitments which will support this strategy's implementation.

Data, digitalisation and technology

The context	Our commitment
Harnessing the right data to deliver timely, trustworthy insights will be crucial for partners to be able to take evidence-based decisions and deliver this strategy in an effective way.	We will use the best quality data and insights available at national, regional and local level to support planning, prioritisation and monitoring our progress in delivering this strategy
Technology evolves rapidly, and it is important that we can use its full potential to run our places and our businesses in a more efficient and sustainable way. Therefore, we must address existing gaps in our tech infrastructure and help businesses learn how to adopt emerging technologies.	We will capitalise on new and emerging technologies to develop technology-driven solutions to tourism industry challenges.

Implementing Scotland Outlook 2030

The context	Our commitment
A new strategy will require us to evolve our approach to working in partnership throughout the public, private and third sectors. This new strategy will require renewed form of strategic oversight, as well as a new structure for delivery. We must also strengthen the relationships between local, regional and national levels of tourism governance.	We will build new alliances in order to achieve the vision of becoming the 'world leader in 21st century tourism'.
The success of this strategy will depend on a wide range of stakeholders both within Scotland and beyond engaging with its themes and actions. Building awareness and inspiring action among stakeholders both in Scotland and beyond is therefore an essential component of our approach to delivering this strategy.	We will communicate our strategy approach to Scotland's tourism sector and other stakeholders in order to encourage engagement and support around the strategy.



Summary of our commitments

Scotland Outlook 2030:

A summary of our commitments

These commitments draw on proposals by tourism industry stakeholders through online surveys and themed workshops, as well as leading international benchmarks and consultation with experts in our four priority areas.

The commitments listed below describe the approach we plan to take in addressing each

area of the strategy; just as the strategy was developed through a partnership approach, it will be implemented using a partnership approach too. Related to each of the following commitments will be a series of prioritised implementation tasks, each with a designated lead organisation and key performance indicator.

Area/Strategic Priority	Our commitment
Responsible Tourism	Scotland's tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045.
	We will ensure that tourism leads to improved community wellbeing and nurtures thriving places across Scotland.
	We will ensure the value of tourism to Scotland's economy continues to increase, and delivers shared prosperity for all, by encouraging the right growth in the right areas.
Our Passionate People	We will ensure that Scotland has sufficient people to create an outstanding workforce, ready to meet the requirements of the 21st century workplace.
	We will support and enable the adoption of Fair Work practices in Scotland's tourism sector.
	We will continue to encourage career development by improving opportunities for career mobility.
	We will actively champion diversity across the tourism sector, so that it reflects a modern Scotland.
Our Diverse Businesses	We will support tourism businesses in Scotland to become more entrepreneurial, agile and resilient.
	We will establish measures to help Scottish tourism businesses commit to sustainable practices.

Scotland Outlook 2030:

A summary of our commitments

Area/Strategic Priority	Our commitment
Our Thriving Places	<p>We will ensure places across Scotland can develop and manage tourism effectively and responsibly.</p> <p>We will actively engage local communities as valued stakeholders in tourism development and delivery.</p> <p>We will enable the whole of Scotland and more sectors of the economy to benefit from tourism demand, by taking a strategic approach to developing the right products in the right places.</p>
Our Memorable Experiences	<p>We will nurture Scotland's tourism assets to deliver high quality, memorable experiences that benefit visitors and the places they visit.</p> <p>We will encourage and enable visitors to explore more of Scotland throughout the year.</p> <p>We will ensure Scotland is an inclusive and accessible destination, enabling all visitors to travel widely and enjoy the full range of the country's visitor experiences.</p>
Data, Digitalisation & Technology	<p>We will use the best quality data and insights available at national, regional and local level to support planning, prioritisation and monitoring our progress in delivering this strategy.</p> <p>We will establish measures to help Scottish tourism businesses commit to sustainable practices.</p>
Implementing Scotland Outlook 2030	<p>We will build new alliances in order to achieve the vision of becoming the 'world leader in 21st century tourism'.</p> <p>We will communicate our strategy approach to Scotland's tourism sector and other stakeholders in order to encourage engagement and support around the strategy.</p>



I'd suggest that the key word going forward is 'Change'. Change in technology, change in skill sets, change in decision-making drivers to values-based rather than just value-based, change in how we look at and protect our natural assets, change in our approach to a more sustainable future in terms of carbon emissions, waste reduction and ethical investment.

**Malcolm Roughead OBE, Chief Executive,
Visit Scotland**

Our next steps

All of the partner organisations which have been part of this journey will now focus on developing an action plan which will outline the key implementation tasks that will be undertaken to deliver against our agreed commitments.

We will have short term, medium term and longer-term implementation tasks and relevant key performance indicators will be agreed. We recognise the importance of having robust measurements in place to track progress and

performance and will put in place a monitoring and evaluation framework.

This is an agile document and has been designed to be responsive to the changing landscape – it will evolve over time.



21st century tourism is our response to the existential threats of our time. It tackles the climate and nature emergencies, addresses over-tourism, promotes wellbeing and supports remote, rural and island communities and economies. It is tourism ready for the world Greta Thunburg and David Attenborough imagine.

James Stuart, Convener, Loch Lomond and the Trossachs National Park.

A collaborative approach

Marc Crothall Chair of the Strategy Steering Group

This is an inspiring, ambitious and bold new direction for Scotland's tourism industry and I would like to thank everyone who has played a part in our journey so far.

This is the beginning of change for our industry and I am looking forward to taking these next steps together to build a stronger, more sustainable tourism product to share with the world and for everyone at home to enjoy and benefit from.

A special thanks to the following:

Strategy Steering Group

Claire Bruce	Glen Tanar Estate
Fiona Campbell	The Association of Scotland's Self-Caterers (ASSC)
Marc Crothall (Chair)	Scottish Tourism Alliance
Marshall Dallas	Edinburgh International Conference Centre (EICC)
Susan Deighan	Glasgow Life
Stephen Duncan	Historic Environment Scotland
Paul McCafferty	Scottish Enterprise
Niall McCandish	Expedia Group
Rob McKinnon	Outer Hebrides Tourism
Anna Miller	Highlands & Islands Enterprise
Malcolm Roughead	VisitScotland
Bettina Sizeland	Scottish Government
James Stuart	Loch Lomond and the Trossachs National Park
Karen Yeomans	North Ayrshire Council

Strategy Project Manager

Karen Christie	Scottish Tourism Alliance
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Strategy Delivery Group

Kevin Brady	Scottish Government
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Fiona Cook	Scottish Government
Steven Dott	Highlands & Islands Enterprise
Lawrence Durden	Skills Development Scotland
Ken Massie	VisitScotland



A collaborative approach


Tourism Leadership Group

Robert Allan	Apex Hotels
Suzanne Cumiskey	Perth & Kinross Council
Gordon Dewar	Edinburgh Airport
Paul Easto	Wilderness Scotland
Russell Imrie	Queensferry Hotels
Stephen Leckie	Crieff Hydro/Scottish Tourism Alliance
Judy Rae	Fife Cultural Trust
Calum Ross	Loch Melfort Hotel/UK Hospitality (Scotland)

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Ian McAteer	The Union
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Manolis Psarros	Toposophy
Pantazis Pastras	Toposophy
Susan Dickie	VisitScotland
Chris Greenwood	VisitScotland
Jacqui Souter	VisitScotland

A huge thank you also to every venue who kindly hosted workshops and seminars which contributed to the development of the strategy.



Building on the wonderful heritage brand that already exists, innovation must be at the core of the approach to tourism going forward. If Scotland is to be the world leader in 21st century tourism, we must continue to develop and deliver an innovative, visionary, and fully sustainable offer that doesn't react to demand, but proactively and creatively anticipates the aspirations and needs of future visitors, whilst protecting and enhancing communities throughout Scotland.

Fiona Campbell, Chief Executive, The Association of Scotland's Self-Caterers (ASSC)