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Ken Massie, Head of Destination and Sector Development

"People, Place and Purpose: a future worth visiting"

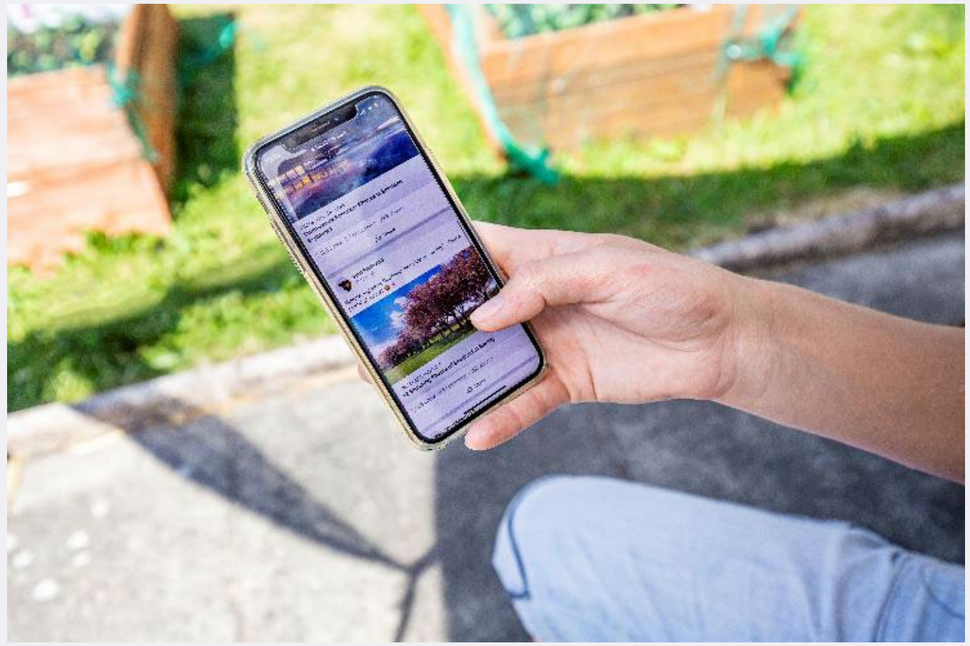
- I’ve not brought a crystal ball – so not a ‘Futurist’s’ view
- A perspective from Scotland
- Our current approach with a future focus
- Some initiatives and some learnings
- We have so much in common



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What we know

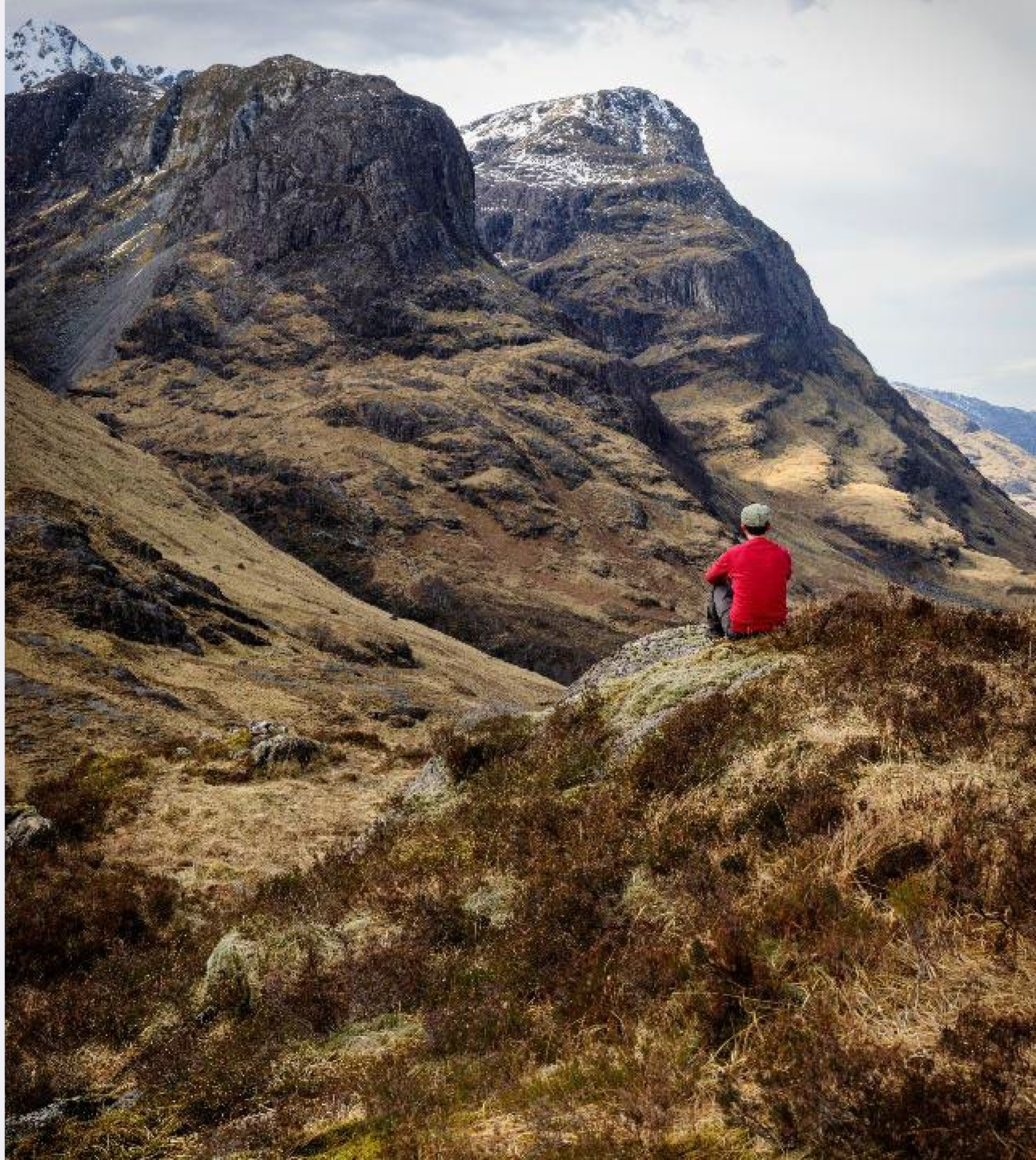
- Seismic changes in the travel industry
- Visitors’ digital-savvy, value-driven behaviour
- The growing accessibility of AI
- The spectre of climate change looms large
- Climate action and develop clear, trusted standards for measuring sustainability
- The future of travel hinges on innovative thinking, stewardship, and willingness to invest in a better shared future





External Environment - Scotland

- The regulatory environment
- Resilience, but…
- Strength of our history, heritage, natural assets, culture and people
- Emerging trends
- The visitor economy as a driver



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SCOTLAND OUTLOOK 2030

Scotland's Visitor Economy



Scotland’s Visitor Economy

A foundation and driver of growth

92 million visits

£4 billion
International overnights

£3.4 billion
Domestic overnights

£4 billion
Domestic day trips

£11.4 billion
Visitor spend (2024)

5.4% GDP
Value of Scotland's total economy (2024)

c.6%
Value of Scotland's total exports (2023)

245,000 jobs (2024)
Single largest employer

16,000
businesses (2024)

£6.1 billion*
Added to the economy annually in total by the Scottish events industry

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Economic Growth Agency

Growing the value of Scotland's visitor economy.



Place Development

Support regional economic strategies and develop our destinations by leveraging the opportunities of public and private sector investment across tourism and events, building on the unique sector strengths of each place.



Business and Experience Development

Deliver sector specific advice and support including helping tourism and events businesses to develop new products and visitor experiences, reaching new audiences and markets.



Market Development

Attract inbound leisure, association conferences, business and corporate travel through a mix of strategic marketing, intermediary, partner and media relations activities.

Attracting investment into Scotland and helping Scotland’s businesses to export.

Leveraging tourism and events as a force for good for all of Scotland’s people and places.

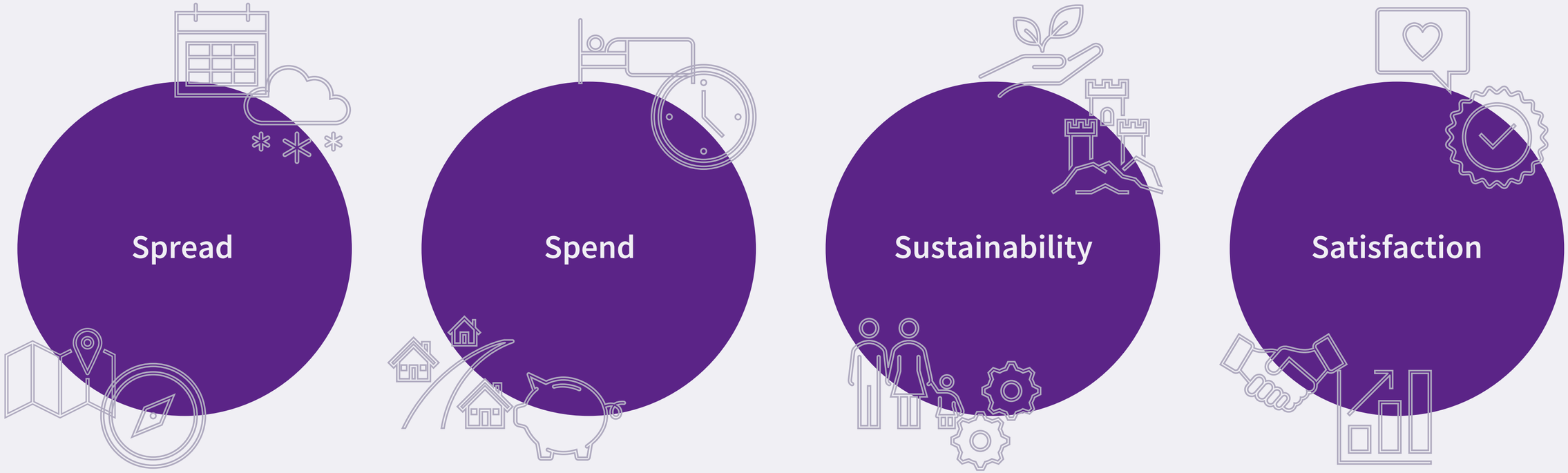
Building Scotland’s international profile as a leading place to visit, live, work, study and do business.

Ensuring data, insight and technology underpins everything we deliver.

SUSTAINABLE GROWTH FULLY INTEGRATED ACROSS THE WHOLE ORGANISATION

What does success look like into the future?

Outcome-driven approach



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Preparing for the Future – Challenges and Opportunities

What we've tried, what we've learned

Investment

- Rural Tourism Infrastructure Fund

Industry

- Business Support Programme

Sub-sector growth

- Scottish Agritourism

Events

- In destination development and placemaking



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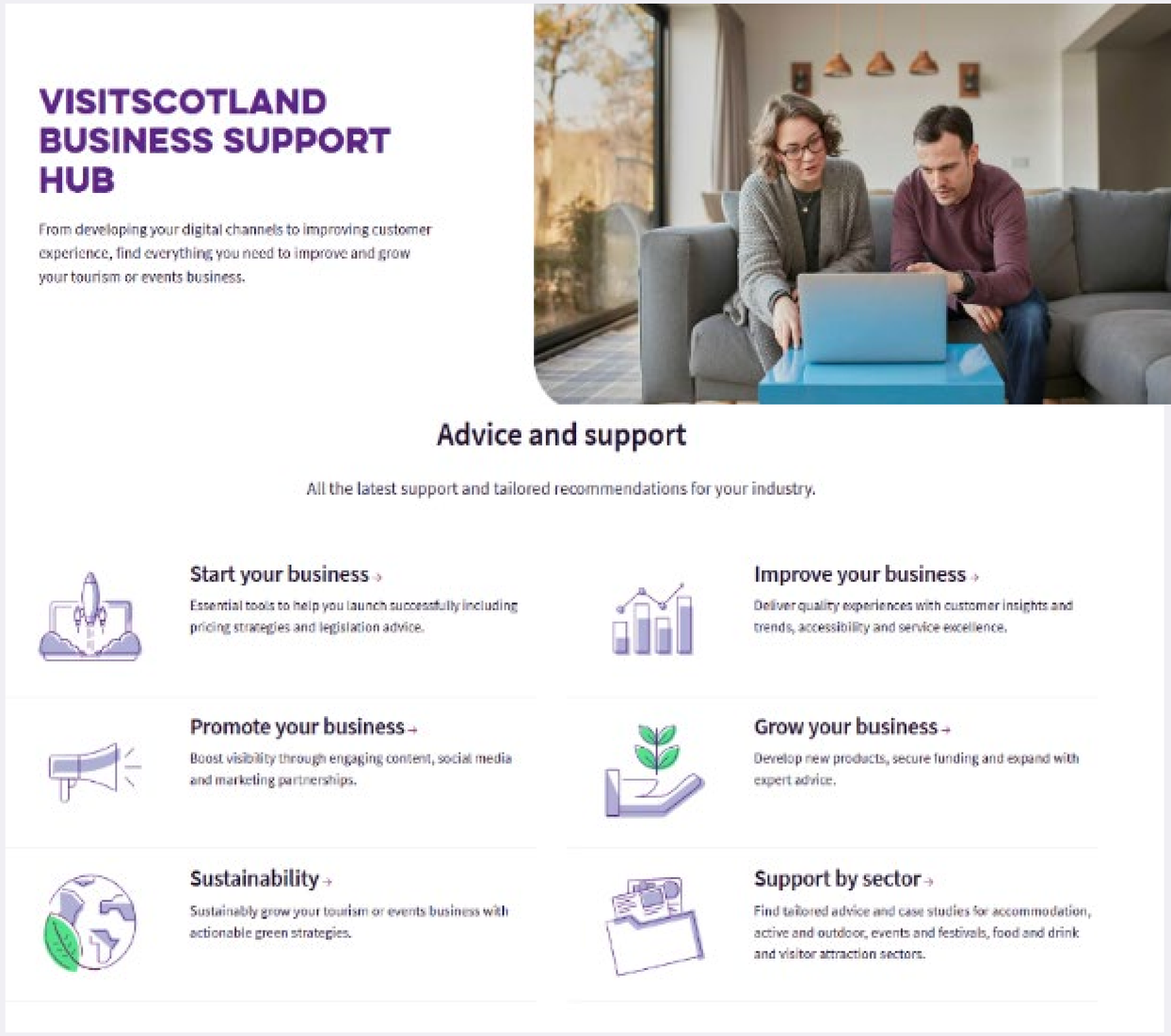
What is the Rural Tourism Infrastructure Fund?

- **Capital fund** supporting rural tourism infrastructure
- Improve the **quality of the visitor experience** in rural parts of Scotland that have faced pressure on their infrastructure due to significant increases in visitor numbers.
- Reduce the impact of **visitor numbers** on local communities and facilities.
- Create a more collaborative and sustainable approach to infrastructure provision and long-term maintenance of local facilities for the **benefit of communities as well as visitors**.
- Across 7 rounds, £24.5m of grant funding has been awarded to **86 projects across 17 local authorities and both national park authorities**.
- **Match funding totalling £20.6m has been leveraged** across the 86 projects.



Business and Experience Development

Targeted support helping businesses to thrive and grow



https://support.visitscotland.org/

Go-to place for advice and support for tourism and events businesses:

- Helping businesses to reach new audiences and markets.
- Product and experience development to meet evolving customer needs.
- Business advice on marketing, channel development, sustainability, and inclusion.
- Sector specific advice and support to capitalise on opportunities connected to events, accommodation, agritourism, cycling, adventure, film, creative industries, culture and heritage, wildlife, food and drink, walking.

Supported by an annual programme of webinars and workshops.

Scottish Agritourism

- Almost half of the 888 businesses offering agritourism and farm retail were established post 2020.
- The current overall sector value is estimated to be £292.9 million.
- Global Agritourism Conference 2026 held in Scotland
- Authentic Scottish experiences
- Spreading visitor spend into rural and island communities
- Well positioned to meet future visitor demand for immersive, regenerative and place-based travel experiences











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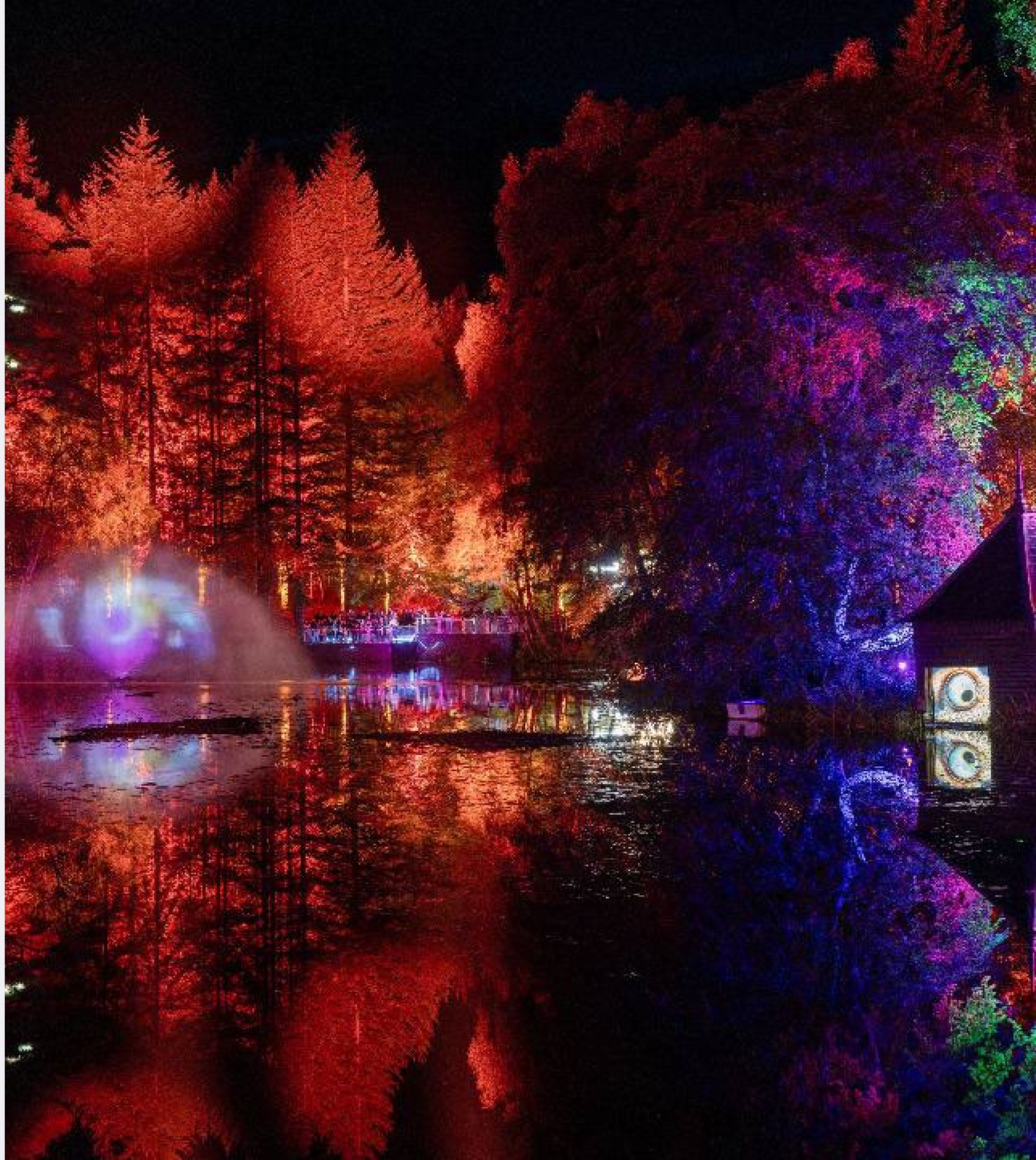
Events - Place & Destination Development

Stranraer Oyster Festival

- Historically best known as a ferry town however, that changed in 2011.
- One of the most successful has been its oyster festival. Launched in 2017 to celebrate the local oyster beds in 2026 organisers are confident of topping the previous best of 34,000 visitors.

Enchanted Forest

- Over the last 25 years close to a million visitors have visited the highlands event.
- Taking place in the shoulder months the event has driven tourism and visitors to the area while also raising money for local community charities (over £130k in 2025)



Market Development - Cycling

As a sport, cycling delivers across multiple policy areas including events, tourism, destination development, active travel, health and wellbeing, environmental sustainability and sporting performance.

Scotland has established itself as a leading cycling nation through investment in infrastructure, its natural assets, successful hosting of major events and the legacy created by the 2023 UCI Cycling World Championships.

2027 Tour De France Grand Depart from Edinburgh.



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People. Place. Purpose.

"The places that thrive tomorrow will not be the places with the most visitors. They will be the places where visitors help create a better future”.

- A future where communities prosper.
- A future where nature recovers.
- A future where culture flourishes.
- A future worth living in.
- And therefore, a future worth visiting.





Thank you