

## Quality and the sustainable visitor economy

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Lee McDonald

International Partnerships Manager



Long Version

- ***QUALITY***
- ***SUSTAINABILITY***
- ***PARTNERSHIP***

- Why Scottish tourism cares about quality
- Why we invest in it
- Its strategic importance for the visitor economy

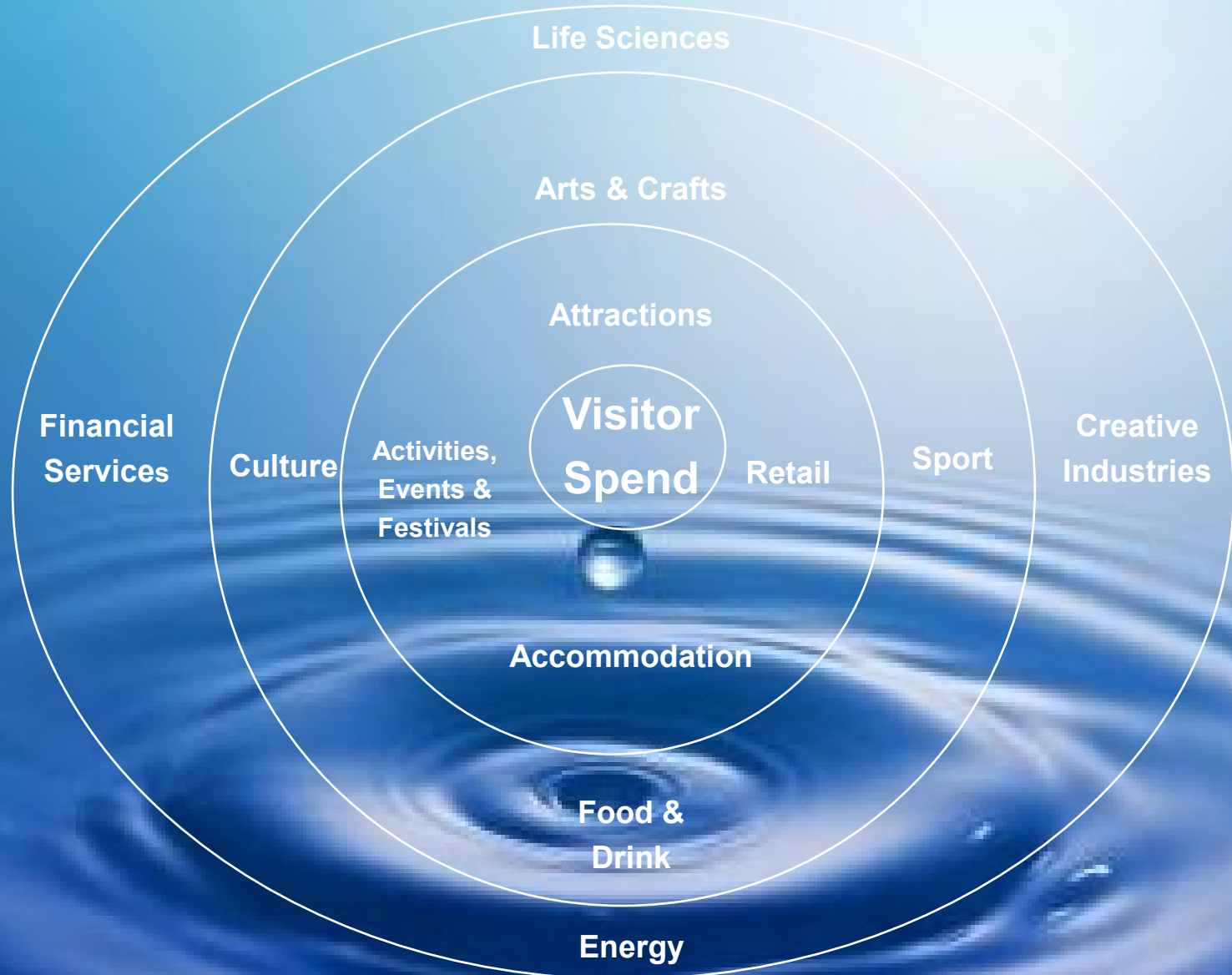
Strategic context: the role and  
position of VisitScotland  
in the Scottish tourism industry

# Who we are



**The Scottish  
Government**

# Moving beyond traditional definitions of tourism





To maximise the sustainable economic benefit of  
tourism to Scotland



“Tourism that takes full account of its current and future **economic, social and environmental** impacts, addressing the needs of **visitors, the industry, the environment** and host **communities.**”

Source: UNWTO

# So how do we deliver...?

A must-visit, *must-return* destination



**Dramatic**



**Human**



**Enduring**

So quality of experience is crucial...





- ✓ All sectors
- ✓ Provides tourism business with ***advice*** to help them grow and maximise their strengths



- ✓ Provides tourism businesses with a ***star rating***



- ✓ Focus on the ***quality*** of the visitor experience
- ✓ Mystery guest visit



# The customer journey...



What to See & Do



Accommodation



# Economic benefit from events



# Growing reputation...

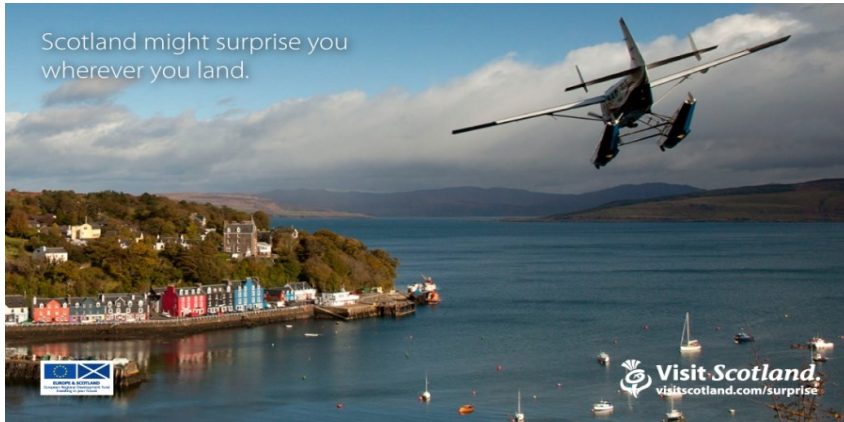
...not just marketing and infrastructure





# Key areas of operation

## Marketing



## Quality



## Information



## Events



...but we can't do it alone...





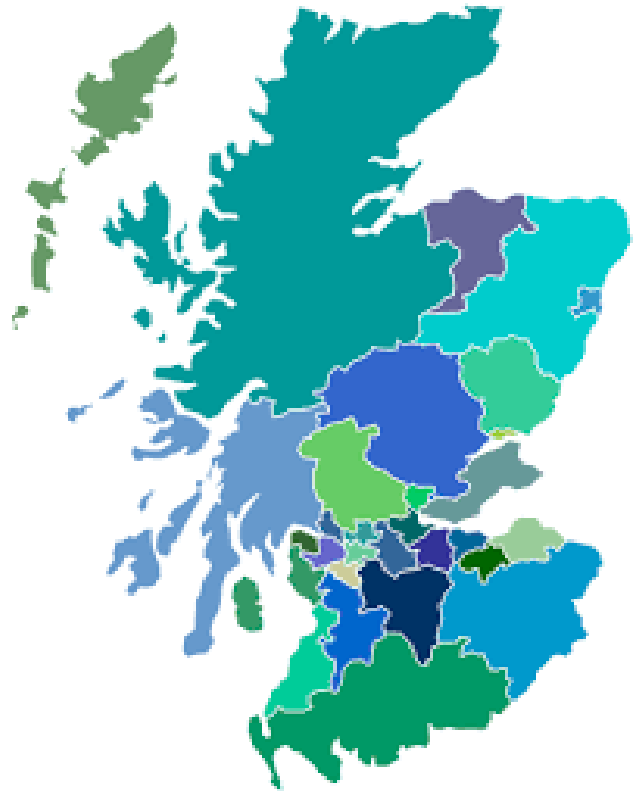
A STRATEGY FOR LEADERSHIP AND GROWTH

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



To make Scotland...

*First choice for **high quality, value for money**  
and memorable customer experiences,  
delivered by skilled and passionate people*



- Influencing role:
- Creation of Tourism Development Framework
- Role of the planning system in delivering the visitor economy

- The primary purpose of this Framework is to:
  - Place tourism at the centre of strategic thinking and planning
  - Provide guidance to council planning authorities to help secure growth in the visitor economy
  - Highlight future opportunities for investment and development
  - Promote actions needed to support growth in a structured and consistent manner



# Some key statistics

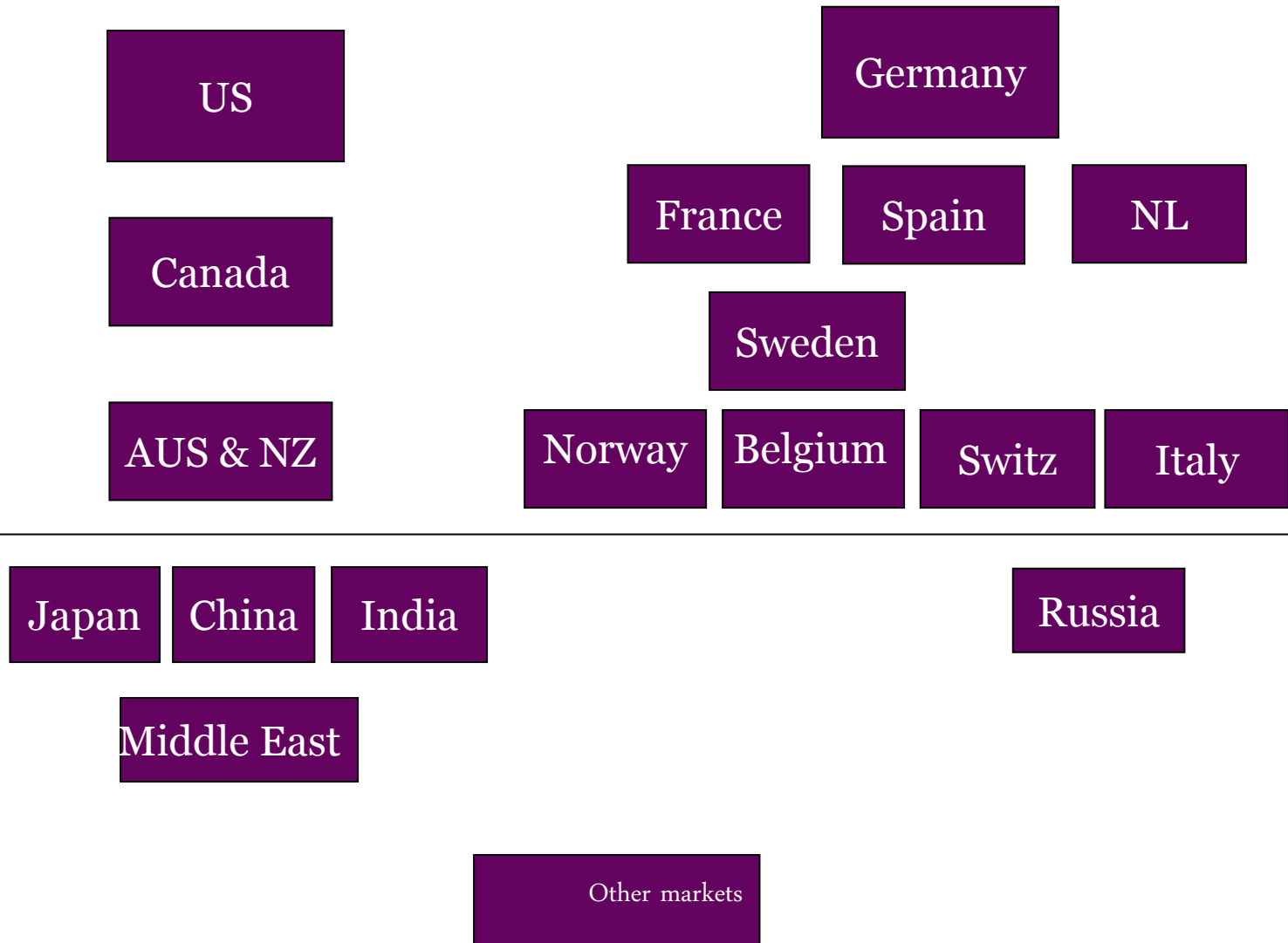
# Tourism is everyone's business

- **£11bn** to Scottish economy
- **15million** overnight visitors
  
- **270,000** jobs
- **20,000** diverse businesses
- **12%** employment
  
- Huge growth **potential**
- A **sustainable**, permanent industry





# Key International Markets



# International markets: volume & value

Rank	Source: IPS (P) 2011, GBTS 2013	Trips(000)	Expenditure (£m)
1	USA	332.6	228.5
2	Germany	250.2	138.3
3	France	169.0	130.4
4	Norway	93.4	112.1
5	Australia	130.2	102.9
6	Canada	103.1	82.5
7	Spain	132.0	79.0
8	Ireland	194.9	74.0
9	Netherlands	131.1	63.6
10	Sweden	60.2	44.6
	Rest of World	749.1	433.9
	<b>Total International</b>	<b>2,345.8</b>	<b>1,489.7</b>
	<b>GB (m)</b>	<b>13,360</b>	<b>3,018</b>
	<b>Total GB and International</b>	<b>15,705.8</b>	<b>4,507.7</b>

**(P) Provisional data.**

# 96%

of visitors to Scotland

*enjoyed their holiday experience*

# The strategic importance of quality

# But...why?



# A more competitive destination

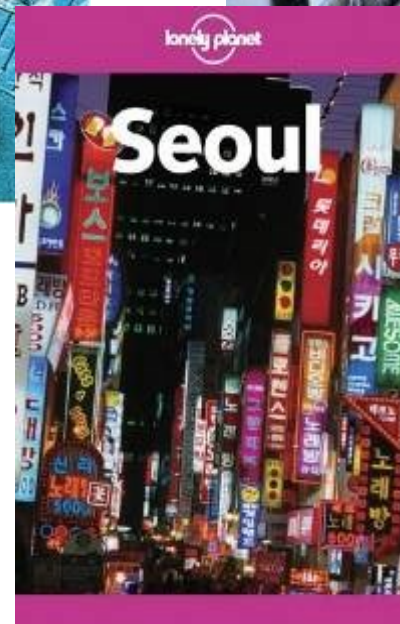
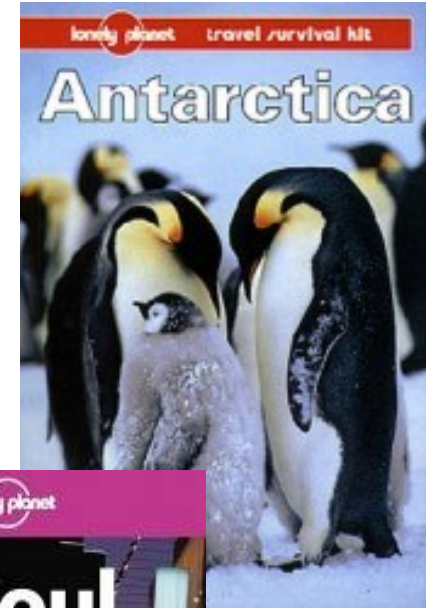


Must *visit?*.... Must *return??*

# Consumer expectations



# A crowded market place





# QA case study



*Jacobrite*  
EXPERIENCE LOCH NESS



- ✓ In short, quality – and consistency – is vital if we are to deliver high quality experiences ...**that attract visitors with a high willingness to pay**
- ✓ This enables us to achieve a more environmentally sustainable growth, by focusing on **building value** rather than volume



# The potential of international partnerships





swedish  
welcome

• • • •  
INNOVATION  
NORWAY





***Quality  
assured***

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**RESTAURANT**

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**MALTA TOURISM  
AUTHORITY**

- **Mutual benefit** from *exchange of best practice*
- Providing a **stronger message to consumers** about the *importance and benefits* of quality
- Creating a **stronger, shared voice** on the *importance of quality and sustainability* for destination development



