



SCOTLAND OUTLOOK 2030 TRACKER

National Tourism Strategy Performance Tracker

March 2025





Our memorable experiences

Visitor satisfaction



Visitor wellbeing



Inclusivity



Accessibility



Seasonal spread



Regional spread



Visitor spend



Our passionate people

Fair work : pay



Fair work: contractually secure work



Fair work : opportunity to progress



Skills shortage



Diverse workforce: sex



Diverse workforce : age



Diverse workforce : disability



Diverse workforce : ethnicity



Our thriving places

Community satisfaction



Community engagement



Sustainable tourism



Tourism management



Social enterprises



Our diverse businesses

Entrepreneurship



Business survival



Environmental sustainability



Responsible tourism

Growth in tourism value



Employment contribution



Employment growth





Visitor wellbeing –

Performance to be confirmed: no prior year data currently available.

Inclusivity –

Performance to be confirmed: no prior year data currently available.

Accessibility –

Performance to be confirmed: no prior year data currently available.

Seasonal spread ↔

Performance maintaining: the seasonal spread ratio worsened only marginally from the prior year.

Visitor spend ↔

Performance maintaining: spend per visit is up only marginally in real terms from the prior year.

Visitor satisfaction ↔

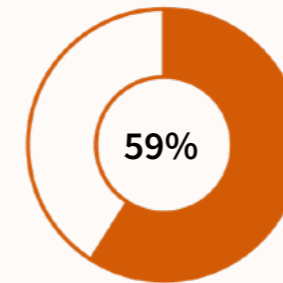
Performance maintaining: visitor satisfaction is up only modestly from the last survey in 2016.

Regional spread ↓

Performance worsening: the regional spread worsened from the prior year.

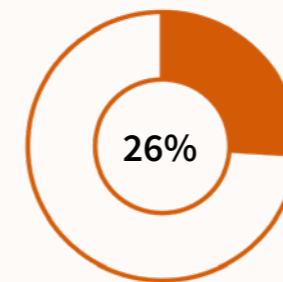
Visitor wellbeing

% of visitors reporting that their trip in Scotland enhanced their physical, mental and emotional wellbeing (9 or 10 out of 10)



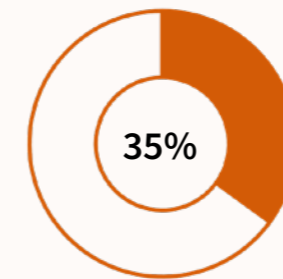
Inclusivity

% of visits taken by domestic overnight visits in Scotland with an impairment



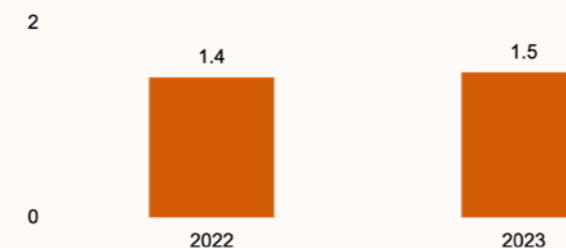
Accessibility

% of visitors to Scotland with access requirements stating it was very easy to get around during their trip



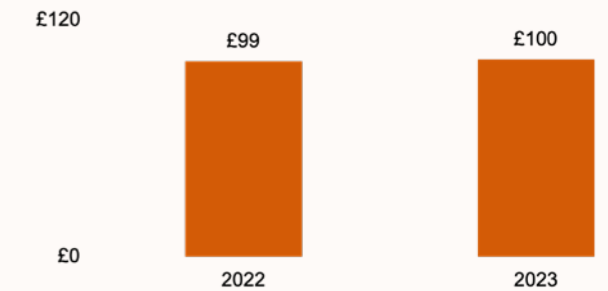
Seasonal spread

Ratio of number of visits in peak quarter to lowest quarter



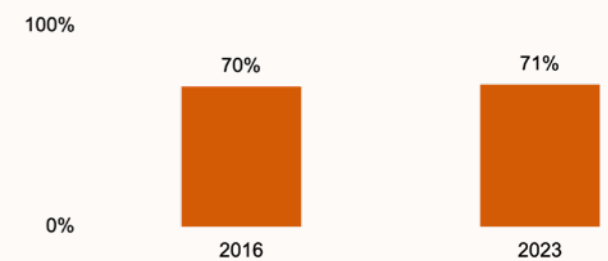
Visitor spend

Average visitor expenditure per visit (2023 prices)



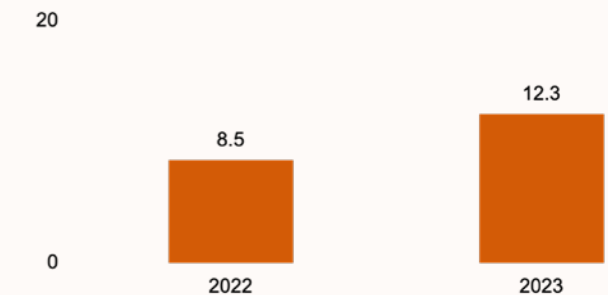
Visitor satisfaction

% of visitors rating their experience as a 9 or 10 out of 10



Regional spread

Ratio of number of visits in most visited region to least visited region





Fair work: opportunity to progress ↑
 Performance improving: the proportion of businesses providing training increased from the prior year but is down from the pre-pandemic level.

Diverse workforce: disability ↑
 Performance improving: the proportion employed who are disabled increased from the prior year.

Diverse workforce: age ↔
 Performance maintaining: the estimated proportion in employment who are young (aged 16-24) increased from the prior year but the change is not statistically significant.

Fair work: contractually secure work ↔
 Performance maintaining: the estimated proportion of employment that is contractually secure remained similar from the prior year and the change is not statistically significant.

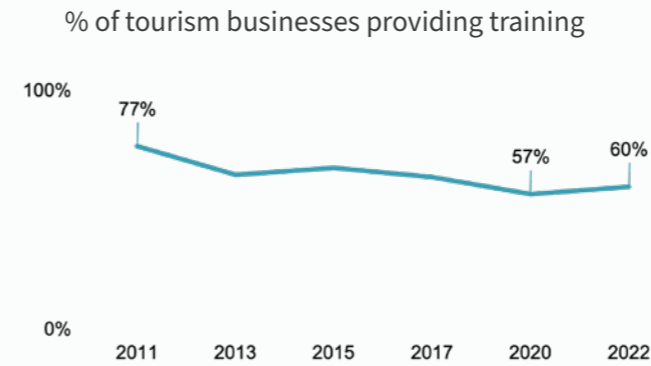
Fair work: pay ↔
 Performance maintaining: the estimated proportion in employment paid the real living wage fell from the prior year but the change is not statistically significant.

Diverse workforce: sex ↔
 Performance maintaining: the estimated proportion in employment who are women fell from the prior year but the change is not statistically significant, and women still account for around half the workforce.

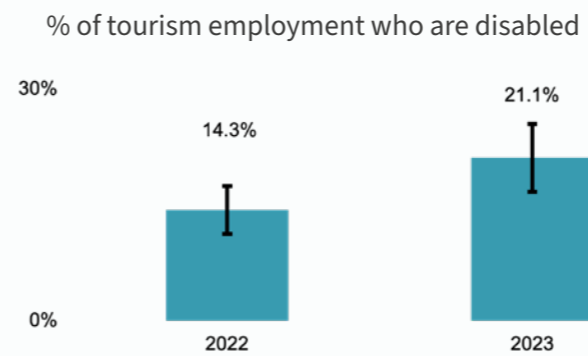
Diverse workforce: ethnicity ↔
 Performance maintaining: the estimated proportion in employment who are from a minority ethnic background fell slightly from the prior year but the change is not statistically significant, and the proportion is still higher than the Scottish economy average (5.7%).

Skills shortages ↓
 Performance worsening: while the 2020 comparison year is impacted by the Covid pandemic, performance in 2022 is also worsening relative to the pre-pandemic trend.

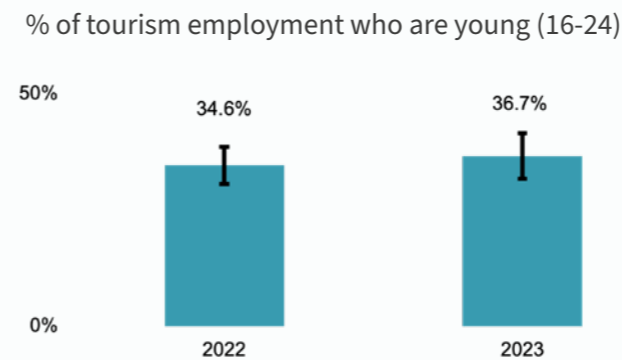
Fair work: opportunity to progress



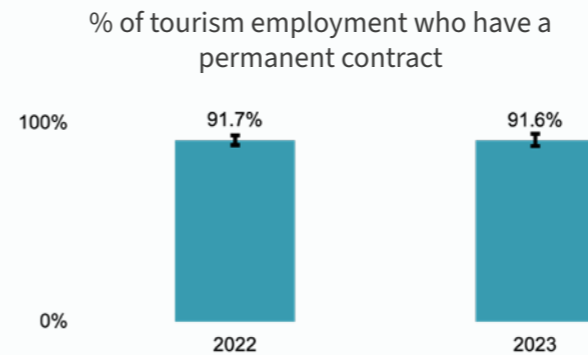
Diverse workforce: disability



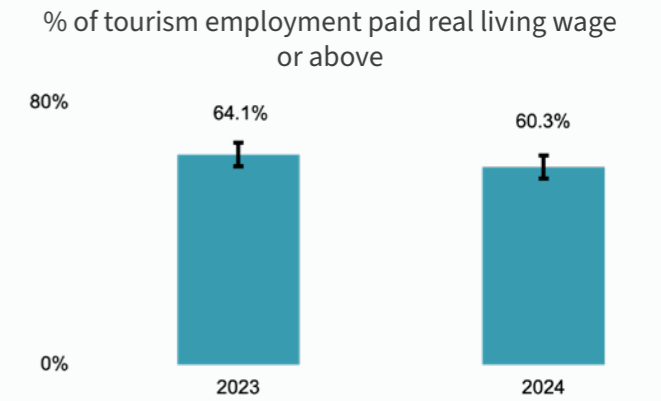
Diverse workforce: age



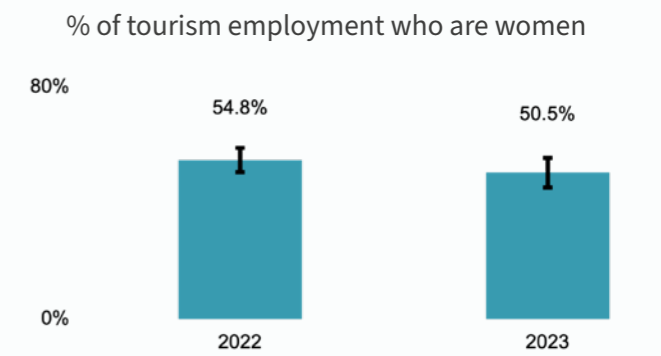
Fair work: contractually secure work



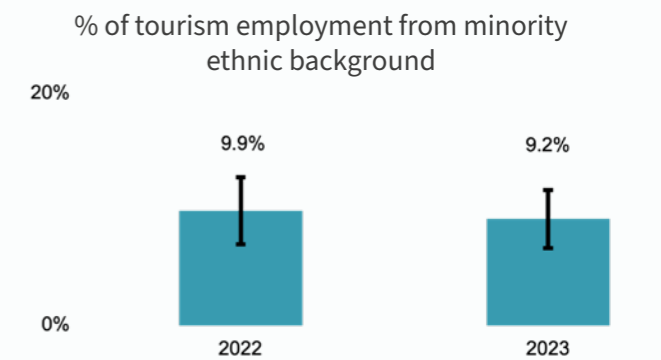
Fair work: pay



Diverse workforce: sex



Diverse workforce: ethnicity



Skills shortage



The black error bars indicate the extent to which the actual figure could differ from the central estimate provided. Footnote e of the 'Indicator measures and source' table provides further information on the need for this.



Community satisfaction ↔

Performance maintaining: the proportion agreeing tourism has a positive impact fell only marginally from the last survey in 2020.

Social enterprises ↔

Performance maintaining: the number of tourism-related social enterprises fell only marginally from the last census in 2019.

Community engagement —

Performance to be confirmed: no prior year data currently available.

Sustainable tourism —

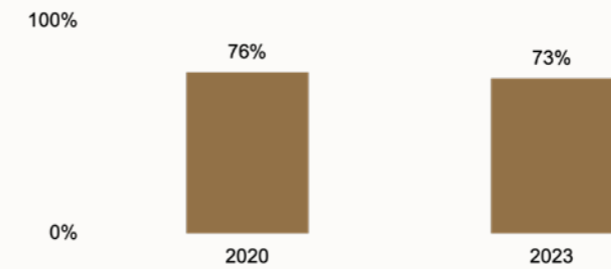
Performance to be confirmed: no prior year data currently available.

Tourism management ↓

Performance worsening: the proportion agreeing there is adequate provision for tourists fell from the last survey in 2020.

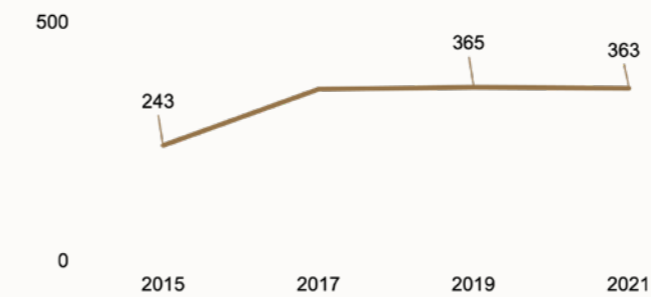
Community satisfaction

% agreeing that tourism has a positive impact on their local community (islands-only)



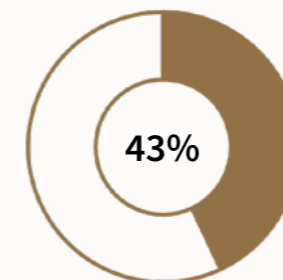
Social enterprises

Number of tourism-related social enterprises



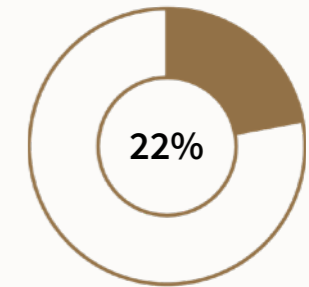
Community engagement

% agreeing their local community is engaged in tourism development and delivery (islands-only)



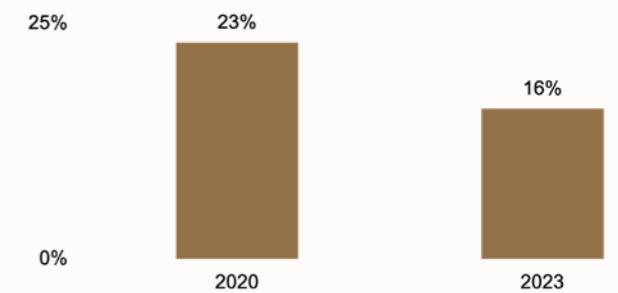
Sustainable tourism

% agreeing tourism is managed sustainably in their local community (islands-only)



Tourism management

% agreeing there is adequate provision for the number of tourists (islands-only)





Entrepreneurship ↔

Performance maintaining: the business birth rate fell only marginally from the prior year but is down from pre-pandemic.

Business survival ↑

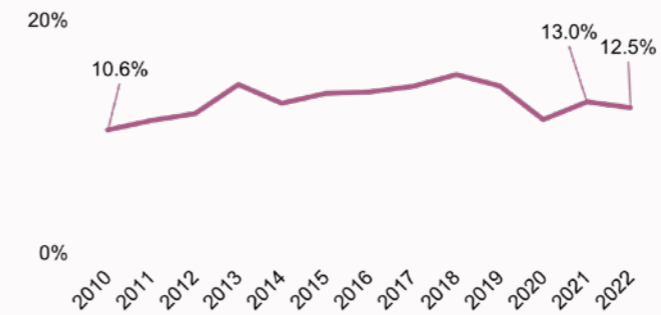
Performance improving: the 3-year survival rate of new tourism businesses increased from the prior year.

Environmental sustainability ↑

Performance improving: the proportion of tourism businesses taking action to reduce carbon emissions increased from the prior year.

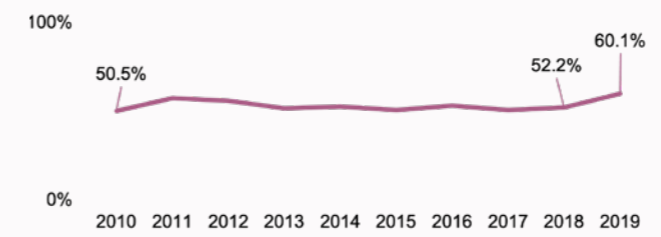
Entrepreneurship

Birth rate of tourism businesses (by birth year)



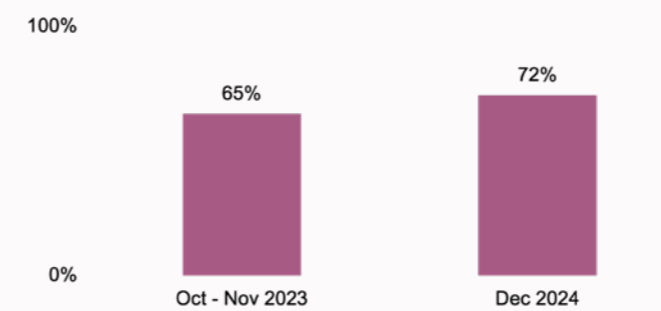
Business survival

3 year survival rate of new tourism businesses (by birth year)



Environmental sustainability

% of tourism businesses taking action to reduce carbon emissions





Tourism value ↔

Performance maintaining: tourism gross domestic product (output) in real prices was up only marginally from the prior year.

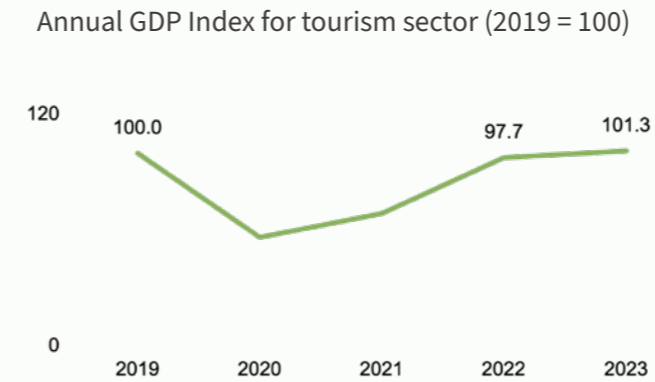
Employment level ↑

Performance improving: tourism employment is up from the prior year and is also above the pre-pandemic level.

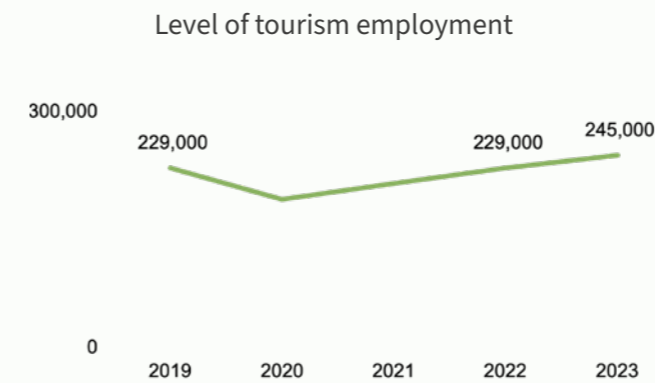
Employment contribution ↑

Performance improving: tourism employment as a proportion of total Scottish employment is up from the prior year and is also above the pre-pandemic level.

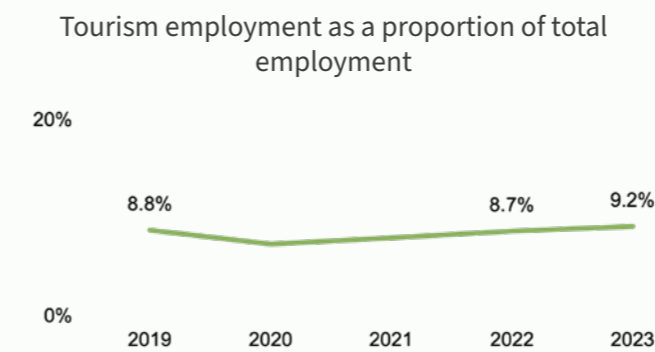
Tourism value



Employment level



Employment contribution



About the Scotland Outlook 2030 Performance Tracker

The purpose of the Scotland Outlook 2030 Tracker is to monitor progress against the objectives set out in Scotland's national tourism strategy, Scotland Outlook 2030.

Each indicator within the Tracker relates to at least one of the Scotland Outlook 2030 objectives as set out in the Scotland Outlook 2030 Strategic Priorities and Commitments table below. Further detail on the indicator measures and sources is set out in the second table below. The indicators will be kept under review and will be adjusted or added to if and when new data becomes available.

Criteria for change: For the purposes of the Tracker, any difference within +/- 5% of the prior year's figure suggests that the position is more likely to be maintaining than showing any change. An increase of 5% or more suggests the position is improving while a decrease of 5% or more suggests the position is worsening. Indicators based on Annual Population Survey (APS) and Annual Survey of Hours and Earnings (ASHE) data are subject to additional significance testing. Footnote e of the 'Indicator measures and source' table provides further information on the need for this.

Scotland Outlook 2030 Strategic Priorities and Commitments

Strategic Priority	Commitment
Our diverse business: We will build business resilience, sustainability and profitability	Support tourism businesses in Scotland to become more entrepreneurial, agile and resilient
	Establish measures to help Scottish businesses commit to sustainable practices
Our memorable experiences: We will provide the very best, authentic and memorable experiences	Nurture Scotland's tourism assets to deliver high quality, memorable experiences that benefit visitors and the places they visit
	Encourage and enable visitors to explore more of Scotland throughout the year
	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
Our thriving places: We will create and develop a sustainable destination together	Ensure places across Scotland can develop and manage tourism effectively and responsibly
	Actively engage local communities as valued stakeholders in tourism development and delivery
	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
Our passionate people: We will attract, develop and retain a skilled, committed, diverse and valued workforce	Ensure that Scotland has sufficient people to create an outstanding workforce, ready to meet the requirements of the 21st century workplace
	Support and enable the adoption of Fair Work practices in Scotland's tourism sector
	Continue to encourage career development by improving opportunities for career mobility
	Actively champion diversity across the tourism sector, so that it reflects a modern Scotland
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 places

Indicator measures and sources

	Indicator name	Indicator measure	Source
Our memorable experiences	Visitor satisfaction	Percentage of visitors rating their experience in Scotland as a 9 or 10 out of 10	Scotland Visitor Survey , VisitScotland
	Visitor wellbeing	Percentage of visitors reporting that their trip in Scotland enhanced their physical, mental and emotional wellbeing (9 or 10 out of 10)	Scotland Visitor Survey , VisitScotland
	Inclusivity	Percentage of domestic overnight visits in Scotland taken by visitors with an impairment	Great Britain Tourism Survey , Visit Scotland
	Accessibility	Percentage of visitors to Scotland with access requirements stating it was very easy to get around during their trip (9 or 10 out of 10)	Scotland Visitor Survey , VisitScotland
	Seasonal spread	Ratio of total (domestic and overseas) number of visits in Scotland in peak quarter to lowest quarter ^a	International Passenger Survey , ONS, Great Britain Tourism Survey , Great Britain Day Visits Survey , VisitScotland
	Regional spread	Ratio of total (domestic and overseas) number of visits in Scotland's most visited region (north/east/south/west) to least visited region ^{a b}	International Passenger Survey , ONS, Great Britain Tourism Survey , Great Britain Day Visits Survey , VisitScotland
	Visitor spend	Average total (domestic and overseas) visitor spend per visit in Scotland	International Passenger Survey , ONS, Great Britain Tourism Survey , Great Britain Day Visits Survey , VisitScotland
Our passionate people	Fair work: pay	Percentage of tourism employment (18+) in Scotland paid the Real Living Wage or above ^{1 d}	Scottish Government analysis of Annual Survey of Hours and Earnings
	Fair work: contractually secure work	Percentage of tourism employment in Scotland (16+) who have a permanent contract ^{d e}	Scottish Government analysis of Annual Population Survey
	Fair work: opportunity to progress	Percentage of tourism businesses in Scotland providing training ^c	UK Employer Skills Survey - Scotland report , Scottish Government
	Skills shortages	Percentage of tourism businesses in Scotland reporting skills shortage vacancies ^c	UK Employer Skills Survey - Scotland report , Scottish Government
	Diverse workforce: sex	Percentage of tourism employment (16+) in Scotland who are women ^{d e}	Scottish Government analysis of Annual Population Survey
	Diverse workforce: age	Percentage of tourism employment (16+) in Scotland who are young (16-24) ^{d e}	Scottish Government analysis of Annual Population Survey
	Diverse workforce: disability	Percentage of tourism employment (16-64) in Scotland who are disabled ^{d e}	Scottish Government analysis of Annual Population Survey
	Diverse workforce: ethnicity	Percentage of tourism employment (16+) in Scotland who are from a minority ethnic background ^{d e}	Scottish Government analysis of Annual Population Survey

	Indicator name	Indicator measure	Source
Our thriving places	Community satisfaction	Percentage of Scottish islands residents agreeing that tourism has a positive impact on their local area ^f	Scottish Islands Survey , Scottish Government
	Community engagement	Percentage of Scottish islands residents agreeing their local community is engaged in tourism development and delivery ^f	Scottish Islands Survey , Scottish Government
	Sustainable tourism	Percentage of Scottish islands residents agreeing tourism is managed sustainably in their local area ^f	Scottish Islands Survey , Scottish Government
	Tourism management	Percentage of Scottish islands residents agreeing there is adequate provision for the number of tourists ^f	Scottish Islands Survey , Scottish Government
	Social enterprises	Number of tourism-related social enterprises in Scotland	Social Enterprise in Scotland Census
Our diverse businesses	Entrepreneurship	Tourism business birth rate in Scotland ^{d g h}	Business Demography, ONS (via Industry Statistics Database)
	Business survival	3-year survival rate of new tourism business in Scotland ^{d g}	Business Demography, ONS (via Industry Statistics Database)
	Environmental sustainability	Percentage of tourism businesses taking action to reduce carbon emissions ^{c i}	Business Insights and Conditions Survey , Scottish Government
Responsible tourism	Tourism value	Average annual tourism gross value added in Scotland at constant prices ^d	Quarterly GDP Index - gross value added at constant prices, Scottish Government (via Industry Statistics Database)
	Employment level	Tourism employment in Scotland ^d	Business Register and Employment Survey (via Industry Statistics Database)
	Employment contribution	Tourism employment in Scotland as a proportion of total Scottish employment ^d	Business Register and Employment Survey (via Industry Statistics Database)

Notes

^a A ratio of 1.0 indicates an equal spread in visitor numbers across regions/seasons. The indicator is said to be worsening if the ratio is increasing.

^b The region visited by each visitor is measured differently in domestic and overseas visits statistics. For domestic visits, it is defined as the main region visited whilst for overseas visits, all regions visited are captured.

^c Tourism sector defined as the Accommodation and Food Services Sector - SIC 55: Accommodation and SIC 56: Food and beverage serving activities.

^d Tourism sector defined using the Scottish Government's Sustainable Tourism (tourism related industries) definition as set out [here](#).

^e ONS have recently conducted analysis to assess the impact of falling sample sizes over recent years on the quality of APS estimates. ONS state that although the APS estimates are robust at National and headline regional level, there are concerns with the quality of estimates for smaller groups of the population. This assessment of the APS estimates alongside the fact that APS estimates have not been reweighted to new population estimates has led ONS, in agreement with the Office for Statistics Regulation

(OSR), to temporarily suspend the accreditation of all APS-based outputs. It is still appropriate to use the APS estimates. However, users are advised to note the increased uncertainty around these estimates in recent years, which is illustrated in the charts using the black error bars which indicate the extent to which the actual figure could differ from the central estimate provided. For further information please see [here](#).

^f Currently, data is only available for the Scottish islands. Data covering the whole of Scotland will be available in late 2026 from the Scottish Household Survey 2025.

^g These figures do not represent a complete picture of business activity as only businesses that are registered for VAT and/or operate a PAYE scheme are included.

^h The business birth rate is defined as business births as a proportion of the active business population. Active businesses are defined as those businesses that had either turnover or employment at any time during the reference period.

ⁱ These figures only cover businesses that are registered for VAT and/or operate a PAYE scheme with 10+ employees and a presence in Scotland.