

Scotland's Economic Engine: The Blueprint for a 21st Century Century Tourism Sector

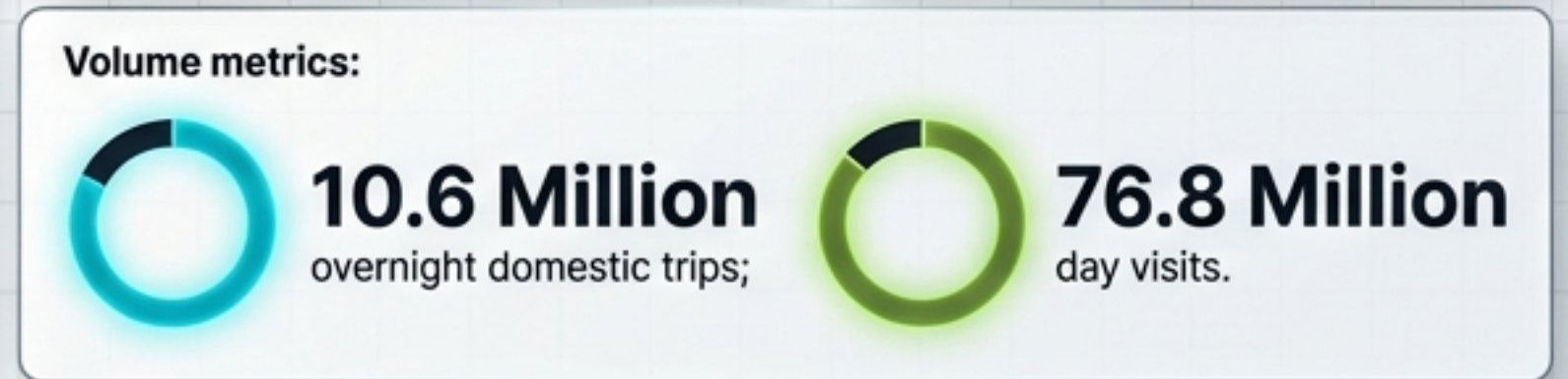
A Strategic Manifesto for Investment, Connectivity, and Sustainable Growth by 2030.

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The Crown Jewel: A Resilient Powerhouse Outperforming the UK.



1 in 11 Jobs and businesses.



A Diverse Economy Anchored in Heritage and Culture.



The Fragility Beneath the Surface: A Tale of Two Markets.

The International Boom

10% increase in market share ↗

4.4 Million inbound visitors ↗

£4 Billion generated ↗

Result: Top-line success, but heavily concentrated (Edinburgh is the only region with more international than domestic visits).

The Domestic Drain

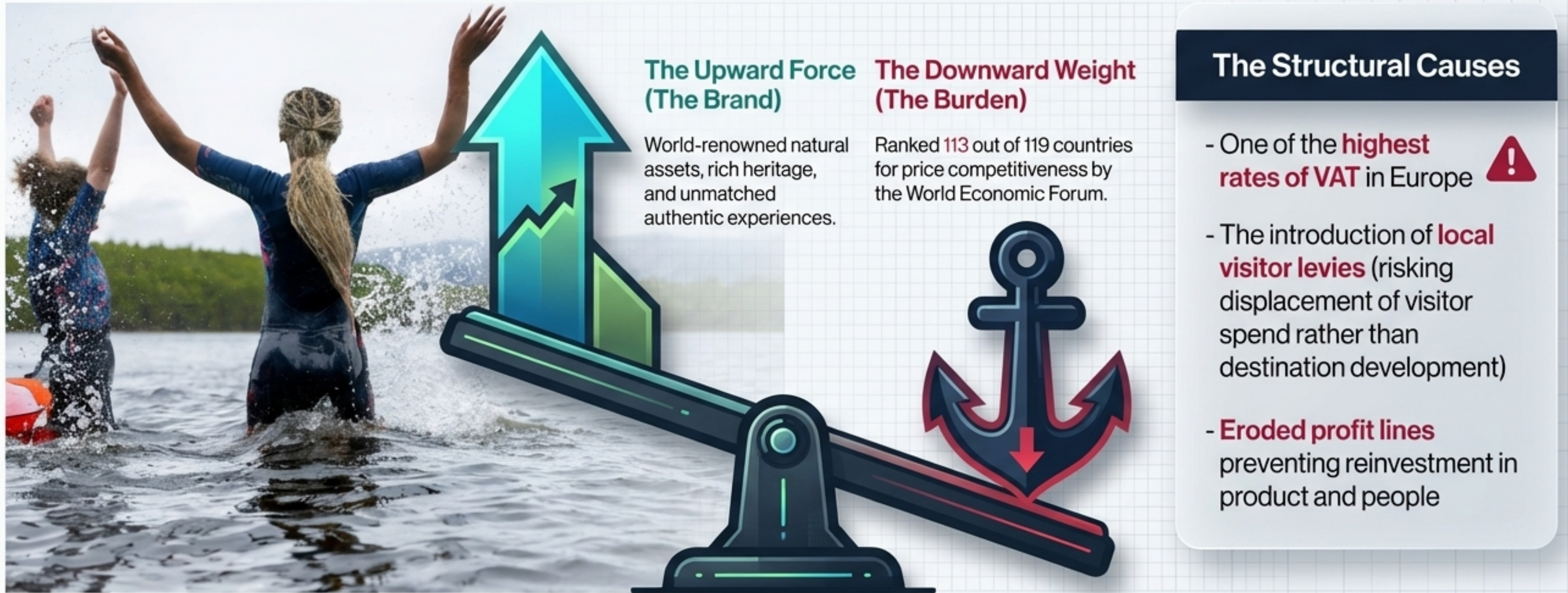
1.4 Million fewer domestic trips in 2024 ↘ ⚠

Shorter stays recorded across the board ↘ ⚠

Cost-of-living squeeze eroding profit margins

Result: Severe threat to the foundational market that travels wider and visits out-of-season.

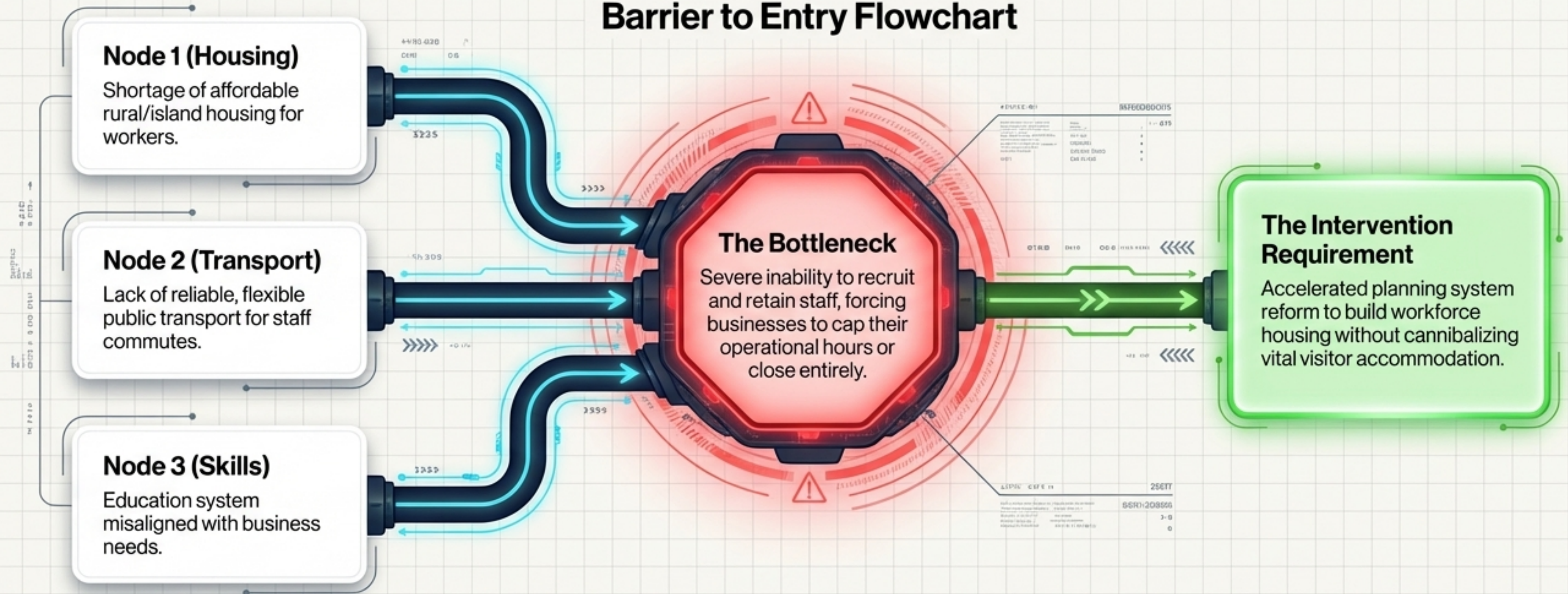
The Competitiveness Deficit: Rich Assets Weighed Down by High Costs.



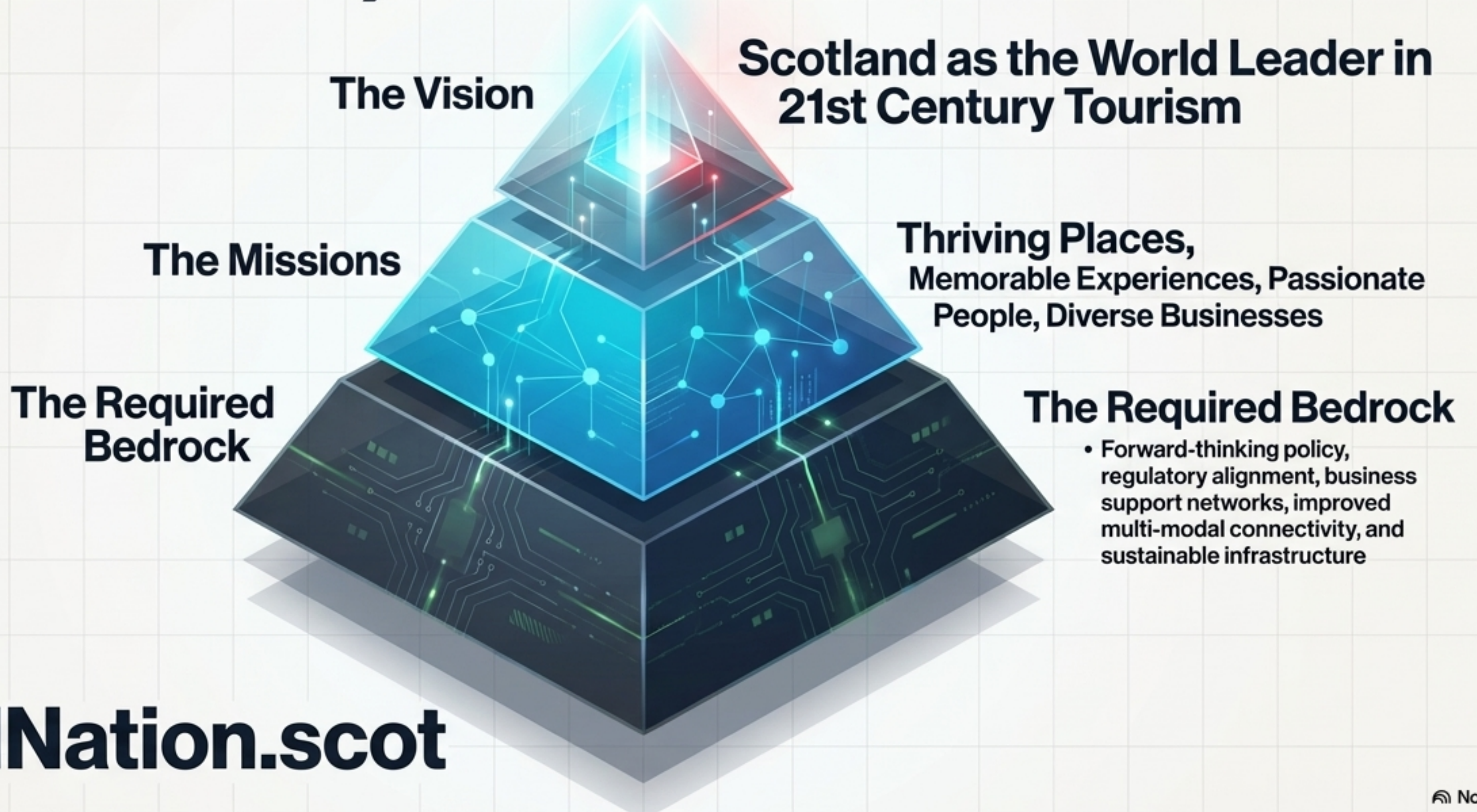
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Unblocking the Choke Points of Growth

Barrier to Entry Flowchart



Building the 21st Century Destination (Outlook 2030)



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The Three-Pillar Roadmap for the Next Scottish Parliament.



Pillar 1: Champion Scotland

Recognize the sector's **crucial role** by creating **dedicated leadership** and aligning government and sector priorities.



Pillar 2: Connect Scotland

Invest heavily in integrated transport and digital connectivity to meet **international standards**.



Pillar 3: Invest in Jobs & Growth

Empower the sector as an economic driver and safeguard future growth through **innovation and AI**.

Pillar 1: Championing the Sector at the Cabinet Level.



Dedicated Leadership

Create a named Cabinet Secretary/Minister role (and shadow positions) to champion tourism, embedding business skills into civil service training.

Marketing ROI

£18 return for every **£1** spent.



Increase long-term funding for VisitScotland, EventScotland, and Destination Management Organizations.



Regulatory Relief

Accelerate non-domestic rates reform (fairer system for hospitality) and utilize a 'carrot rather than stick' approach for net zero compliance.

Pillar 2: The Connectivity Network Required for Dispersal.

Physical Links

Seamless integration of **Planes**, **Ferries**, **EVs**, and **Trains** via smart ticketing.

Urgent modernization of the **ferry** and train fleets.

Expanding direct flight routes to Highlands/Islands and exploring sustainable aviation fuel (Grangemouth).

Digital Links

Mandatory expansion of **4G/5G**, **fibre broadband**, and reliable **Wi-Fi**, specifically targeting rural and island 'blackspots' to enable digital visitor experiences.

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Pillar 3: Empowering an Economic Driver to Fill the £2.6B Gap.

Strategic Growth

Co-create a 'Scottish Tourism and Hospitality Growth Plan' focusing on exports.

Capital Investment

Unlock major project funding via the Scottish National Investment Bank (SNIB).

Workforce Development

Prioritize tourism in the UK Growth and Skills Levy; align the education system to provide work-based learning and reskilling for the economically inactive.

The Multiplier Effect: A Rising Tide for Local Economies.

Local Economies.



Core Insight: Due to the interconnected nature of the industry, the opening or closure of a single tourism business creates a cumulative shockwave across the local community. **Funding tourism is funding the community.**

Safeguarding the Future: Data, AI, and Digital Transformation.



The Tech Gap

Over 90% of the sector comprises micro and small businesses that urgently require targeted training to harness AI and digital tools to remain globally competitive.

Digital-First Policy

Embracing QR technology and contactless systems to reduce the regulatory burden on businesses.

Data & Innovation

Investing in precise national data collection for evidence-based policymaking, and creating a dedicated Tourism and Hospitality Future Innovation Fund (in partnership with Interface).

The Alliance: 15,000 Businesses Ready to Partner for Scotland's Future.

The Authority

The Scottish Tourism Alliance (STA) represents over **250 trade associations** and **15,000+ connected businesses** across all regions of Scotland.

The Final Word

Tourism does not 'just happen.' As the **heartbeat** of our local communities and our **most reliable export**, we are ready to work with the next **Scottish Parliament** to **turn**.