

The Value of Outdoor Access to the Visitor Economy



Loch Tummel, Perthshire

Presentation Outline

- Outdoor tourism research
 - Economic value
 - Visitor motivations
 - Visitor trends
- How we market Scotland
 - Key audiences
 - The customer journey
 - Partnership power
- Promoting the Scottish Outdoor Access Code
- Content/activity coming soon



Volume & Value

Market	Trips (2017/ million)	Nights (2017/ million)	Spend (£) (2017/ million)	Spend per trip (£)
International	3.2	24.4	2,276	£711.25
Domestic	11.6	39.0	3,006	£259.13
Total Overnight	14.87	63.46	5,282	£355.21
Tourism Day Visits	151	N/A	5,995	£39.7
Overall Tourism	165.87	63.46	11,277	



Economic Value - Walking

2015	SHORT WALK/ STROLL (UP TO 2 MILES/ 1 HOUR)			LONG WALK, HIKE OR RAMBLE (MINIMUM OF 2 MILES/ 1 HOUR)		
	Trips (000's)	Nights (000's)	Expenditure (£m)	Trips (000's)	Nights (000's)	Expenditure (£m)
SCOTLAND TOTAL	3058	11756	959	2069	9355	776
	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip
SCOTLAND TOTAL	82	314	4	83	375	5

Source: GBTS, 2015 (activities under taken as part of a trip)

Economic Value – Cycling & Mountain Biking*

THREE YEAR AVERAGE (2013-2015)		
	CYCLING - ON A ROAD/SURFACED PATH	MOUNTAIN BIKING
Trips (000's)	261	122
Nights (000's)	1324	466
Spend (£m)	74	43
Nights Per Trip	5.1	3.8
Spend Per Trip (£)	285	355
Spend Per Night (£)	56	93

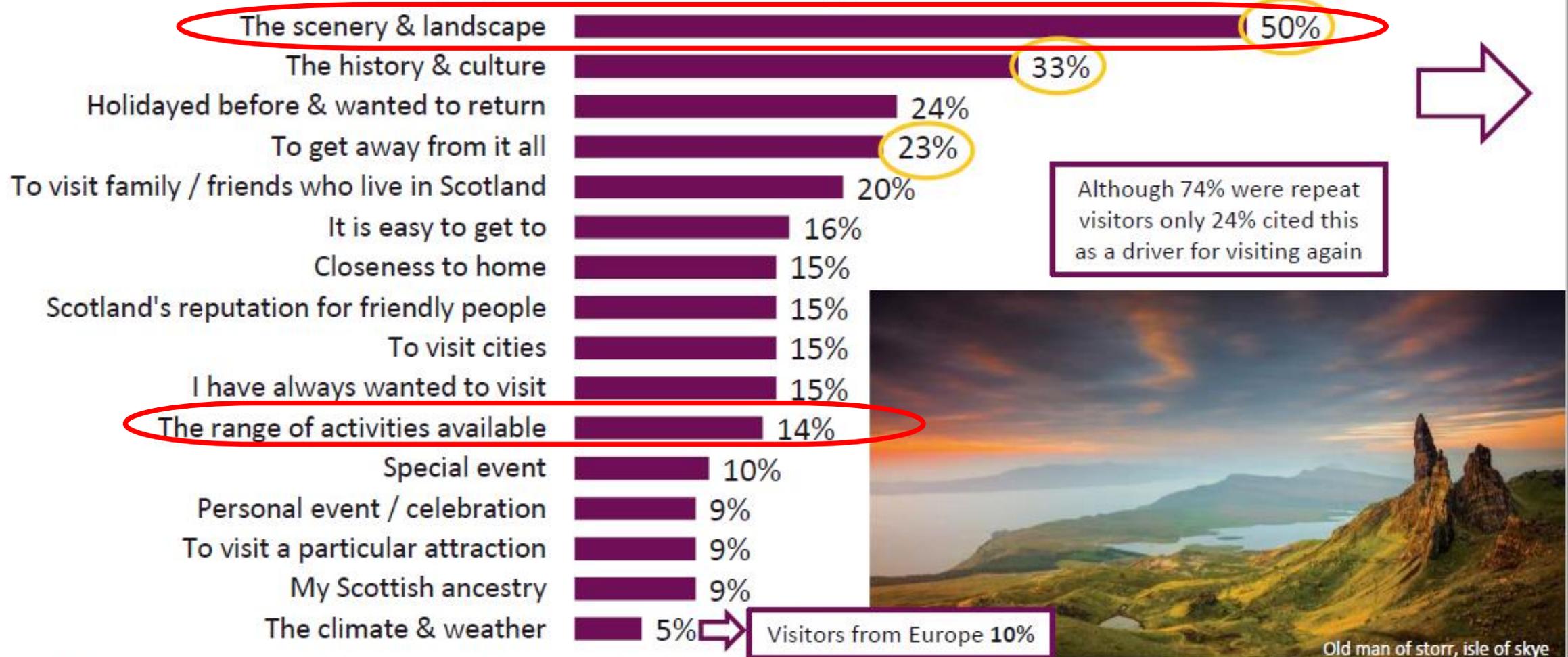
Source: GBTS 2013-2015

Economic Value - Wildlife

ATTRACTION	VISITS (000S)	NIGHTS (000S)	SPEND (£M)	NIGHTS PER TRIP	SPEND PER TRIP (£)	SPEND PER NIGHT (£)
Visiting a wildlife attraction\ nature reserve	401	2378	177	5.9	441	74
Watching wildlife, bird watching	494	2735	187	5.5	379	68
Visiting a zoo\safari park	348 	1453	127	4.2	365	87

Source: GBTS, 2015 (Activities undertaken/attractions visited as part of a trip)

Scotland's scenery and landscape remains a key motivation to visit, as does its history and culture. Other drivers vary by market and visitor type.



Q10 Thinking broadly about your decision to choose Scotland for your holiday or short break, what was it that attracted you to spend your holiday / short break in Scotland on this occasion? Base: S1 All (11743)

What visitors do and where

	Aberdeen & Shire	Argyll & the Isles	Ayrshire & Arran	Cairngorm National Park	Dumfries & Galloway	Dundee & Angus	Edinburgh City	Fife	Glasgow City	Gr.Glasgow & Clyde Valley
x is a place I have always wanted to visit	27%	35%	32%	30%	23%	14%	50%	27%	37%	35%
I have spent a holiday / short break in x before and wanted to do so again	33%	38%	34%	49%	43%	16%	33%	37%	27%	29%
x's reputation for friendly people	16%	20%	19%	21%	15%	15%	25%	25%	23%	26%
To visit family/friends who live in x	45%	27%	28%	17%	24%	34%	22%	36%	39%	33%
The range of activities available (e.g. walking, mountain biking, golf)	15%	26%	23%	50%	18%	11%	14%	27%	15%	19%
To visit a particular attraction	19%	24%	13%	24%	32%	40%	40%	37%	27%	30%
To get away from it all	25%	48%	36%	41%	41%	24%	20%	33%	19%	27%
To visit cities	19%	7%	3%	2%	6%	20%	33%	23%	33%	25%
The history and culture	36%	45%	27%	31%	35%	25%	65%	41%	53%	48%
The scenery and landscape	50%	84%	68%	71%	63%	40%	61%	59%	39%	71%
The climate and weather	4%	4%	6%	8%	10%	4%	8%	12%	5%	6%
Closeness to home	9%	13%	17%	22%	13%	9%	4%	8%	9%	5%
It is easy to get to	21%	15%	27%	26%	26%	10%	16%	24%	22%	18%
Something else	19%	20%	18%	21%	23%	18%	15%	19%	19%	22%
Unsure	-	0%	1%	-	2%	3%	0%	2%	2%	3%
BASE	193	177	185	112	141	75	1053	119	389	198

Q7 And what was it that attracted you to come to REGION on this occasion?

What visitors do and where

<http://www.visitscotland.com/search-results?...>

	Highlands	LTNP	Lothians	Perthshire	Scottish Borders	SFFV	Orkney	Outer Hebrides	Shetland
x is a place I have always wanted to visit	58%	35%	33%	20%	42%	31%	48%	59%	52%
I have spent a holiday / short break in x before and wanted to do so again	36%	39%	26%	39%	35%	29%	34%	48%	30%
x's reputation for friendly people	26%	22%	10%	20%	22%	17%	17%	24%	26%
To visit family/friends who live in x	16%	15%	38%	31%	20%	33%	23%	28%	39%
The range of activities available (e.g. walking, mountain biking, golf)	27%	31%	18%	24%	32%	12%	16%	22%	16%
To visit a particular attraction	31%	14%	21%	19%	29%	40%	39%	31%	23%
To get away from it all	37%	48%	29%	38%	34%	28%	29%	49%	33%
To visit cities	22%	12%	30%	11%	17%	33%	4%	2%	2%
The history and culture	55%	35%	53%	34%	47%	48%	74%	54%	57%
The scenery and landscape	87%	78%	60%	74%	67%	68%	75%	87%	75%
The climate and weather	10%	8%	10%	8%	6%	6%	4%	7%	4%
Closeness to home	9%	12%	7%	7%	13%	9%	4%	11%	6%
It is easy to get to	16%	23%	14%	21%	22%	18%	4%	11%	5%
Something else	15%	21%	17%	19%	17%	18%	27%	18%	27%
Unsure	1%	2%	4%	0%	-	1%	-	-	-
BASE	975	84	84	149	127	132	209	167	135

Q7 And what was it that attracted you to come to REGION on this occasion?

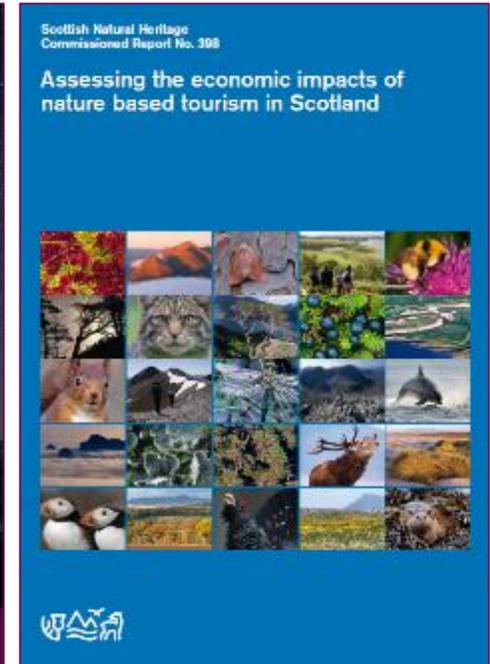
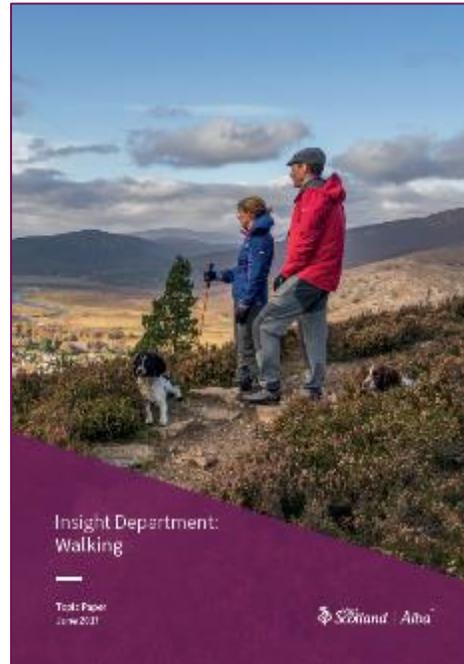
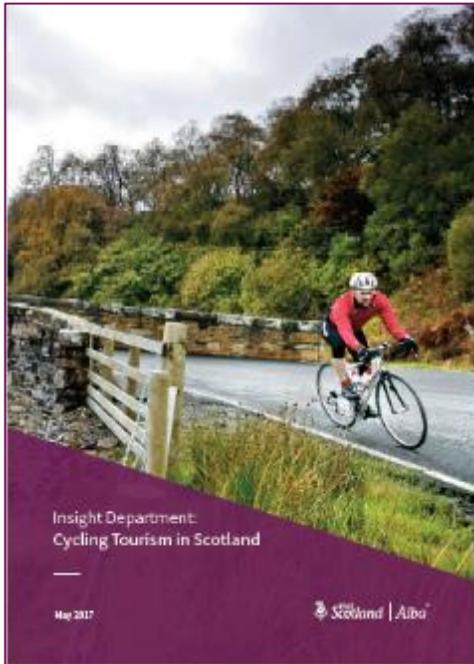
Visitor Trends

- Wellness/well-being – restorative recreation
- The art of now – learning journeys/self-enrichment
- Green getaways – destinations selected on credentials
- Digital Detox – re-connect with nature
- Memories not materialism
- Sensory tourism – experiencing the unexpected
- The rise of e-bikes – exploring more
- Slow adventure – immersive experiences

Find out more at www.visitscotland.org/research-insights/trends



Further Insights



[NEW Dark Skies & Astro-tourism 2019](#)

[VisitScotland Walking Topic Paper 2017](#)

[VisitScotland Cycling Tourism in Scotland 2017](#)

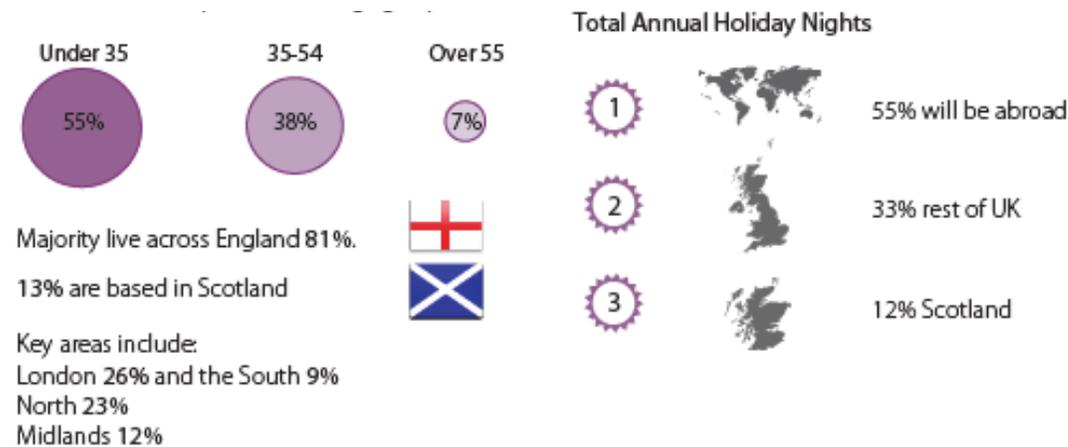
[VisitScotland Wildlife Tourism 2017](#)

[SNH – Assessing the economic impacts of nature based tourism in Scotland 2010](#)

Adventure Seekers



“Adventure Seekers want an active holiday where they can enjoy both outdoor and cultural activities. They will venture off the beaten track and will be engaged by trying new things and pushing their limits and experiences. Holidays will really energise them”



Adventure Seekers think Scotland is best for:

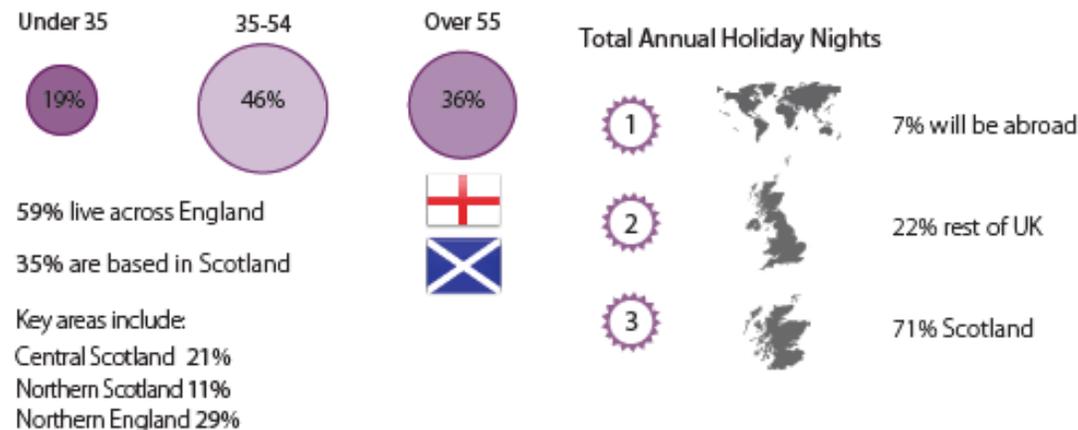
- 13% 'the main holiday of the year'
- 20% 'a longer holiday (a week or more) but not the main holiday of the year'
- 67% 'a short break of 1-6 nights'



Natural Advocates



“Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breathtaking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time.”

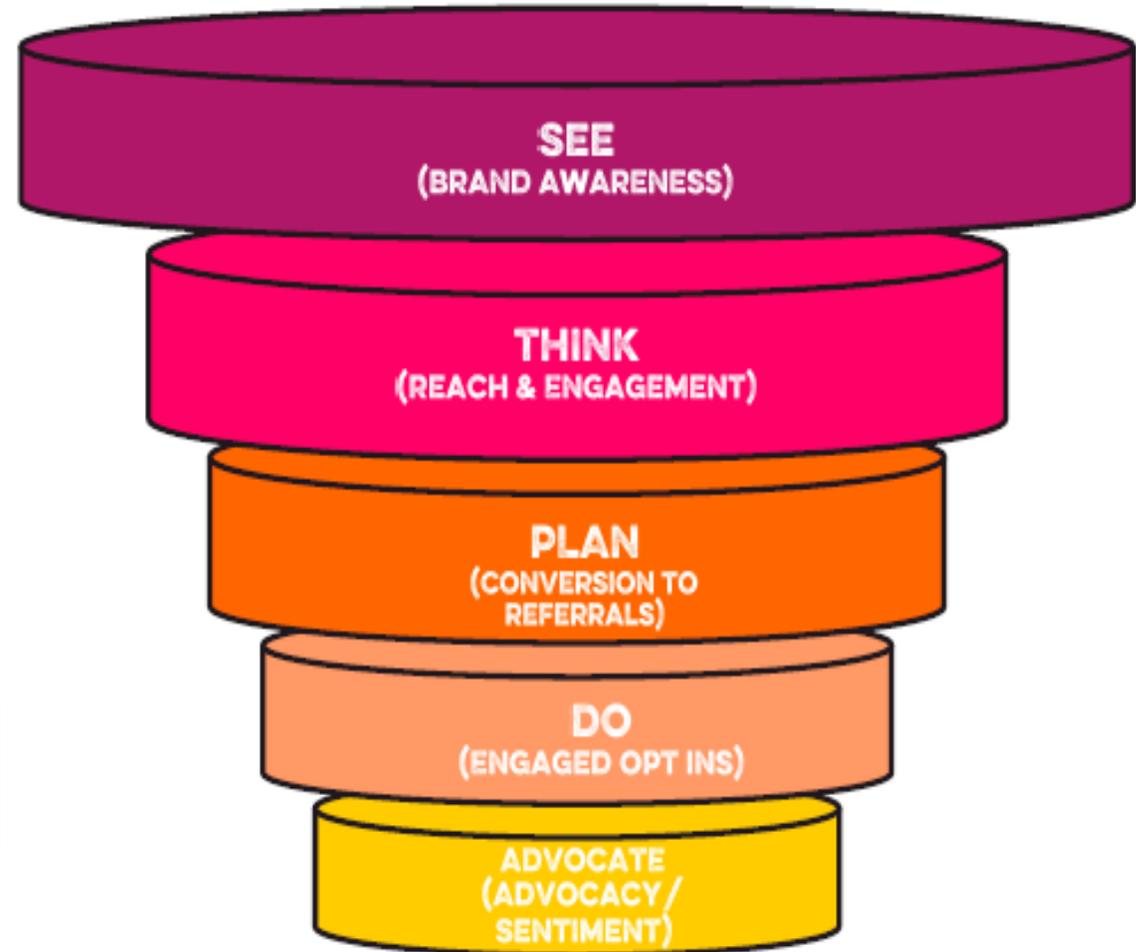


Natural Advocates think Scotland is best for:

- 48% 'the main holiday of the year'
- 16% 'a longer holiday (a week or more) but not the main holiday of the year'
- 36% 'a short break of 1-6 nights'



The Customer Journey & VisitScotland Channels



Partnership Power



National Walking and Cycling Network

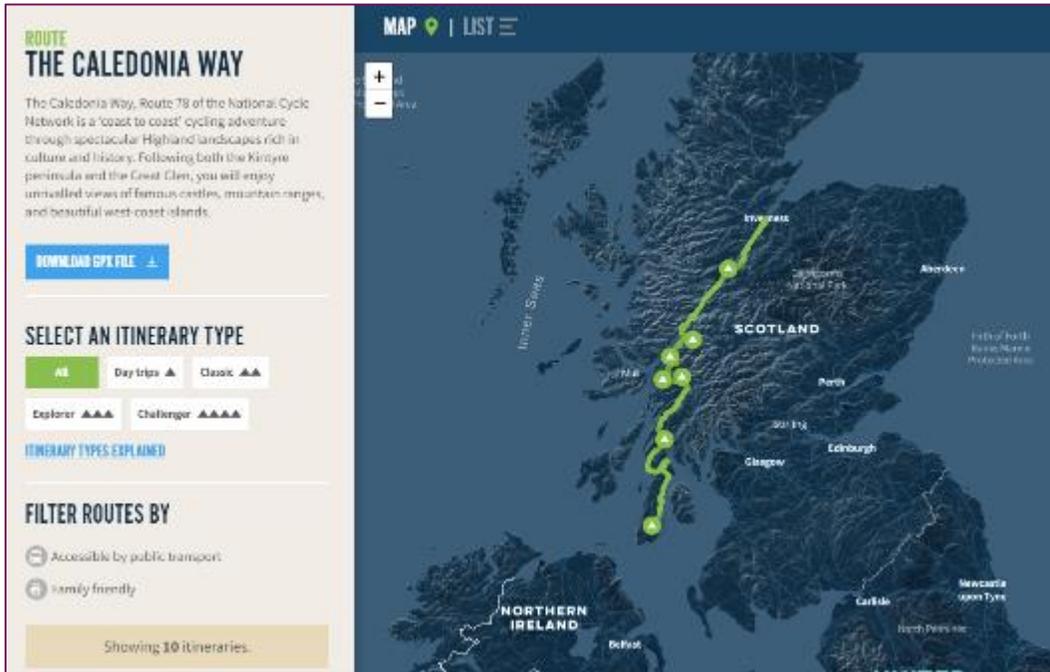


Scottish Natural Heritage
Dualchas Nàdair na h-Alba

nature.scot

Sustrans

- Regularly co-create content with Sustrans
- VisitScotland.com and VisitScotland blog hosted



- Launch June with small promo campaign
- Initially feature NCN78, NCN754 added in summer, further 6 routes
- One-stop planner - Sustrans content, VS listings, VS.com hosted
- Includes day trip options and now live on [VisitScotland.com](https://www.visitScotland.com)



Forestry & Land Scotland

Home > Things To See & Do > Landscapes > Forests & woodlands > A leaf peeper's guide to autumn woodland walks

LANDSCAPES AND NATURE

A LEAF PEEPER'S GUIDE TO AUTUMN WOODLAND WALKS

You don't need us to tell you why a walk in the Scottish woods is truly magical (just take a look at the beautiful pictures below if you need more convincing!).

Take a wander to be transported into your very own fairy tale with the crunch and crackle of leaves under your feet. Watch as the sunlight burns through the trees, piercing in and around the blaze of red, orange, yellow and brown leaves. Breathe in the fresh woodland air amid the warmth of the forest.

Enjoy a short break in Scotland this autumn and make your first trip a wander through the woods, where you can look out for colourful leaves, and maybe even a woodland creature.

Most of these walks can be reached on a day trip from a nearby city, or why not take a longer break in the countryside? It's the perfect way to relax and appreciate the sheer beauty of the world around you.

THE HERMITAGE, PERTHSHIRE



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Look out for: The massive stand of Douglas Fir trees, including one of the tallest trees in the country - as big as a giant!

This landscaped, almost cathedral-like wooded grove of towering trees overlooks the spectacular falls of the River Braan. Perched high above is the delightfully restored Georgian folly of Ossian's Hall which



LEAF SPOTTING

Leaf spotting is the simple pastime of admiring spectacular autumn colours in the great outdoors.

Scotland is among the best places in the world to enjoy and appreciate autumn's vibrant colours. Leaf spotting is a wonderful way to enjoy the season and experience the beauty of the outdoors. It's a simple pastime that can be enjoyed by everyone, from children to the elderly. So, grab your binoculars and head out into the countryside to enjoy the vibrant autumn colours.

Where to spot the best leaves

Topical Park is a beautiful woodland in Perthshire, Scotland, and is a great place to enjoy the autumn colours. The park is home to a variety of trees, including oak, birch, and maple, which all turn vibrant shades of red, orange, and yellow in the autumn. The park is also home to a variety of wildlife, including deer, rabbits, and birds. So, if you're looking for a peaceful spot to enjoy the autumn colours, Topical Park is a great choice.

Activities:
Leaf spotting





Scottish Natural Heritage

Scotland's Nature

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Home About

Agroforestry in Scotland? Forestry Grant Scheme funding still available until December 2020 Getting close to biodiversity at Flanders Moss National Nature Reserve

Scotland shines in springtime

Posted on February 23, 2019 by Scottish Natural Heritage

Spring is in the air and as nature begins to wake up there has never been a better time to visit Scotland's National Nature Reserves. Whether you're wildlife spotting or just want to get out and enjoy some fresh air and spectacular scenery, these special places are great to explore. Here are 10 of the best spring surprises Scotland has to offer and where you might find them:

1. Stacks of seabirds



Puffin at Sumburgh Head, Shetland © Louise GR SMH

Website

- [www.nature.scot](#)

Scottish Natural Heritage on Facebook



Recent Posts

- An 8-Gun Submarine at the a' Roinne
- Bids / The Joyful Bird that Foretells Death
- Helping Orkney's Native Wildlife Thrive
- Beautiful but deadly - the plant with a dark side
- Invasive Species
- Weck...and Beyond
- Wonderful woodland wanders for National Walking Month

Archives

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- March 2019
- February 2019
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Start » Der Blog » Natur » Schottland glänzt im Frühling

DER BLOG

SCHOTTLAND GLÄNZT IM FRÜHLING

Steve Duncan · April 3, 2019 · [Kommentare deaktivieren](#)

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Der Frühling lagt in der Luft und die Natur erwacht. Dies ist die beste Zeit, um Schottlands nationale Naturschutzgebiete zu besuchen. Egal, ob Sie Wildleben beobachten oder nur nach draußen möchten, um die frische Luft und die spektakuläre Landschaften zu genießen, diese besonderen Orte sind ideal für Erkundungen. Hier sind 10 der besten Frühlingserwartungen, die Schottland zu bieten hat und Informationen darüber, wo diese zu finden sind. Vielen Dank für die Tipps an unsere Freunde von Scottish Natural Heritage.

VIELE, VIELE SEEVÖGEL



Seevögel kehren nach einem langen Winter auf dem Meer zum Brüten an die Küsten von Schottland zurück. Lassen Sie sich nicht die Möglichkeit entgehen, Tausende von Seevögeln zu sehen, darunter Papageientaucher, Lammern, Tordalke, Krähencharben und Dreizehenmöwen, die sich auf den Klippen von Inseln und Küsten sammeln. Unweit von Edinburgh liegen die [Isle of May](#) und [St Abb's Head](#), fantastische Orte, um diesem Spektakel beizuwohnen und auf Shetland sind die nördlichsten Klippen von [Hermess](#) und [Noss](#) wundervolle und dramatische Ausflugsziele.

WUNDERVOLLE WILDBLUMEN

Mountaineering Scotland

FishPa/FMS

2. HEAD FOR THE HILLS AT DUSK



There's something a little bit magical about the idea of heading to Scotland's mountains as the sun goes down, when everyone else is returning home from their day in the hills.

Long midsummer evenings, moonlight and a forecast of clear skies, are the perfect combination for enjoying sunset over summits, high-level star gazing and nocturnal nature. With the right planning, preparation, skills and respect for the risks, midsummer hillwalking around dusk can be an awesome experience.

Mountaineering Scotland has given us some great advice for twilight hillwalking:

- Choose the right night – clear, warm, settled
- Don't be too ambitious – follow good paths and start out low
- Take the essential kit – food, torch, shelter, clothing layers
- Get the hills skills – navigation, navigation, navigation
- Keep company – find a friend, a club or a guide

Read their [ten tips for heading to the hills from dusk to dawn](#) before you venture out.

SCOTTISH MUNROS AND MUNRO BAGGING

Free challenge, reward your fitness by seeing it, to conquer Scotland's Munros, a list of Scottish mountains over 900m (2,953ft), which are named after Sir Hugh Munro, a 19th-century naturalist and geologist. Climbing these peaks is a great way for anyone and anyone to explore some of Scotland's finest scenery and heritage along your way.

The highest mountain in Scotland is Ben Nevis, 1,344m (4,411ft) high, though there are many, but requires more strenuous climbing to reach, such as the 12 highest of the Munros, which are the 12 highest mountains in Scotland, known as the 'Munro Top 12'.

Whether you're a beginner or an expert, it's a great challenge to take on. Bagging involves climbing all 283 Munros, a task that can take years to complete. It's a challenge that can be done in a weekend, or over a longer period, depending on your fitness and experience. It's a challenge that can be done in a weekend, or over a longer period, depending on your fitness and experience.

ROUTE IDEAS



- MUNRO TOP 12
- POPULAR MUNROS
- CLIMBING BEN NEVIS

SAFETY INFORMATION

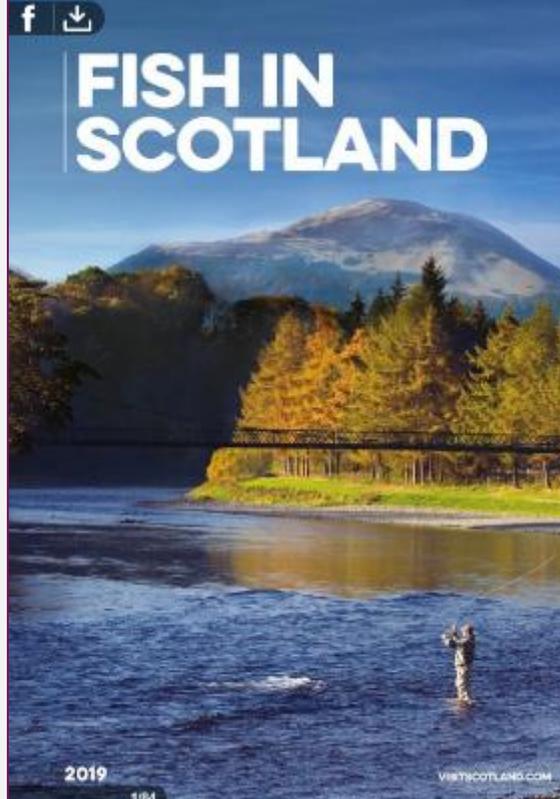


- BEAT THE STORM
- KNOW YOUR LIMITS
- KNOW YOUR WEATHER
- KNOW YOUR EQUIPMENT

MUNRO BAGGING ON FILM



FISH IN SCOTLAND



2019

1/84

VISITSCOTLAND.COM

ACTIVE FISHING IN SCOTLAND

There are not many sports which combine peaceful surroundings, a chance for some contemplation and also a few thrills. Yes, fishing is one of our favourites, and Scotland is one of the world's top destinations for freshwater and sea angling, with world-class fishing available across the country throughout the year.

So if you're chasing the 'King of fish', the Atlantic salmon, or you prefer the hard fighting monster pike or giant common skate, we've got you covered.

TYPES OF FISHING

You will discover a tremendous variety of species when fishing in the hundreds of rivers and lochs around Scotland. From beautiful Highland rivers to secluded island lochs, there are excellent salmon, trout and coarse fishing opportunities in some of the most picturesque areas of the country.

VIEWS FROM THE WATER

From the River Tweed in the Scottish Borders to Loch Awe in Argyll, you'll find yourself totally immersed in the finest Scottish landscapes. You might even have an entire water course to yourself.

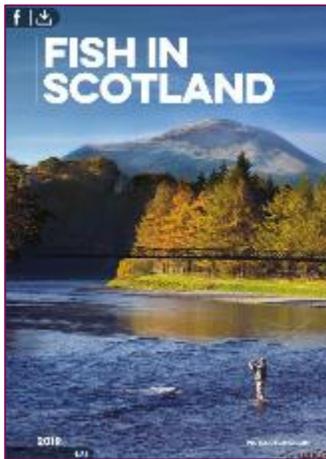
BEGINNERS AND GROUPS

Whatever your level or ability, there are many companies that offer lessons for beginners and those looking to brush up on their techniques. Groups are welcome in many fishing areas, where you can learn from friendly guides and guides who will happily share some pointers and advise on the prime fishing spots. Why not come and try it with a few friends or the family, and see who can hook the biggest catch?

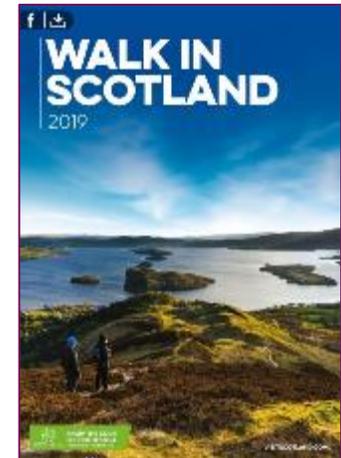
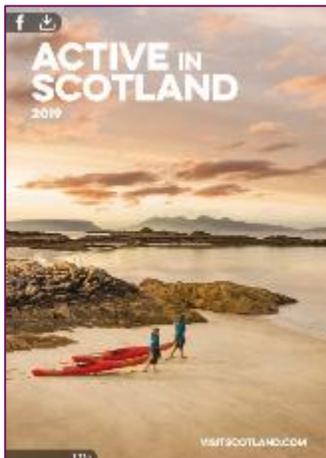
SEA ANGLING

If you prefer sea fishing then Scotland's long and rugged coastline provides fabulous angling opportunities for both boat and shore anglers. You will also find many quality charters available to take you in search of that next great catch. There are numerous species offshore but the skate, cod and bumble shark fishing off the west coast are a favourite with visitors and locals alike.

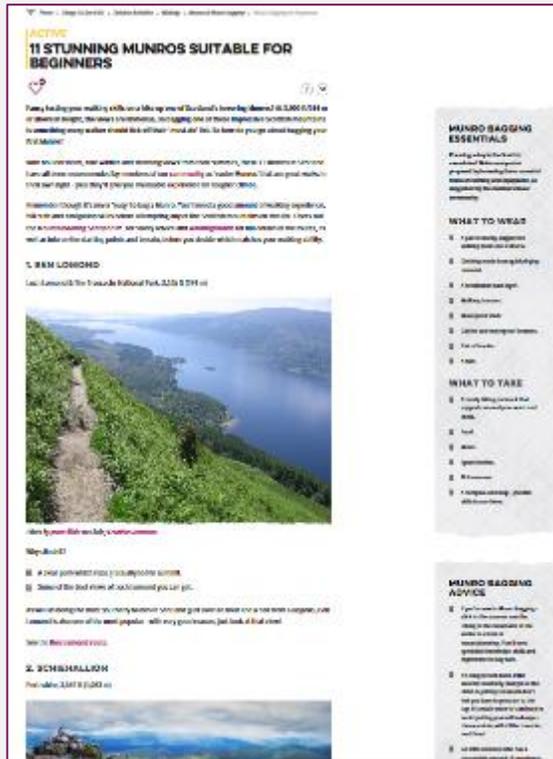
Promoting the Scottish Outdoor Access Code - print



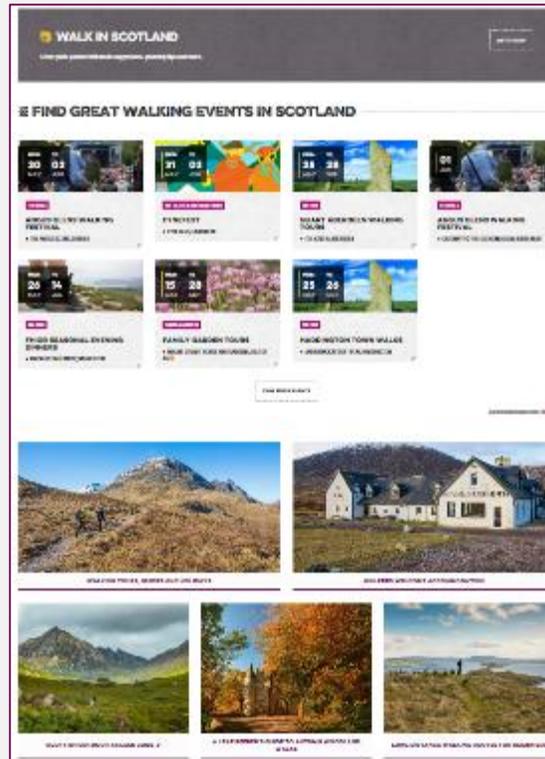
- Annually produced guides have carried messaging since Land Reform enacted.
- Guides are also available digitally.



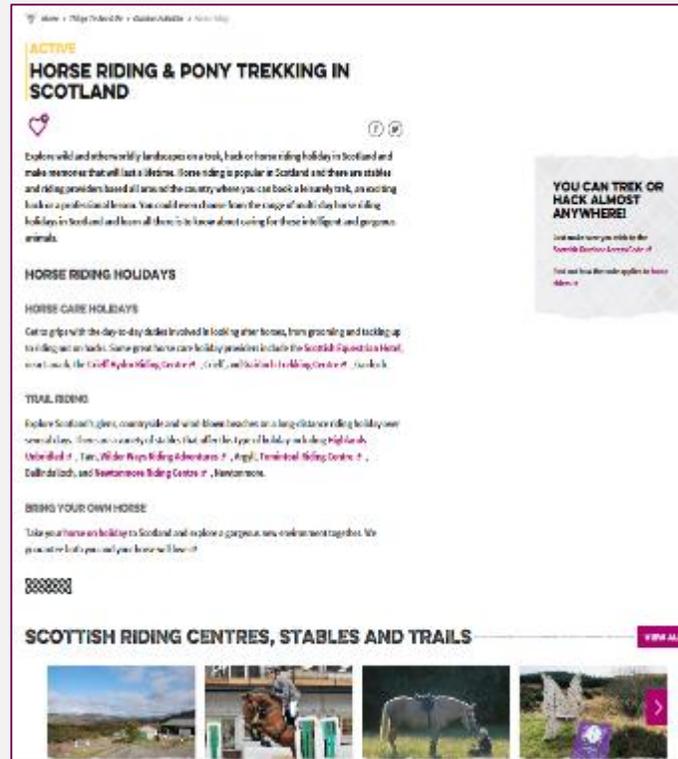
Promoting the Scottish Outdoor Access Code - online



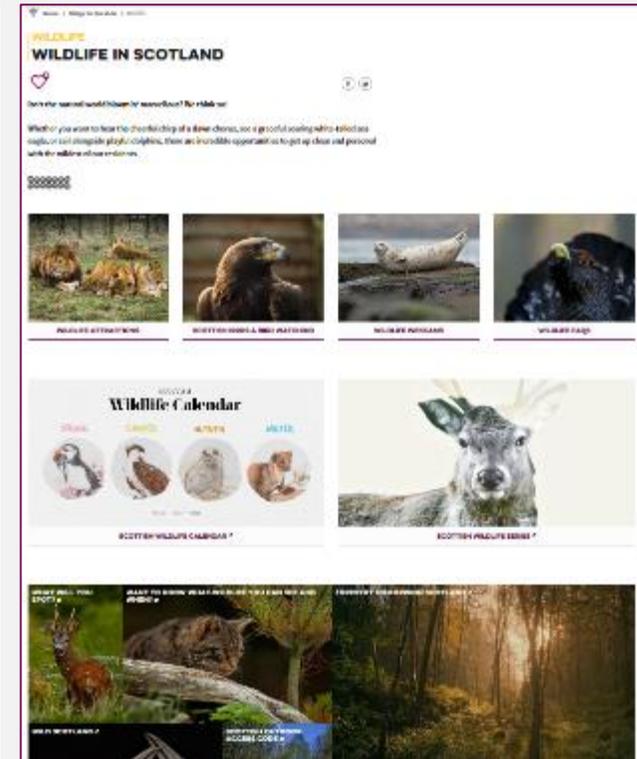
Munro-bagging in Scotland



Walks in Scotland



Horse-riding in Scotland



Wildlife in Scotland

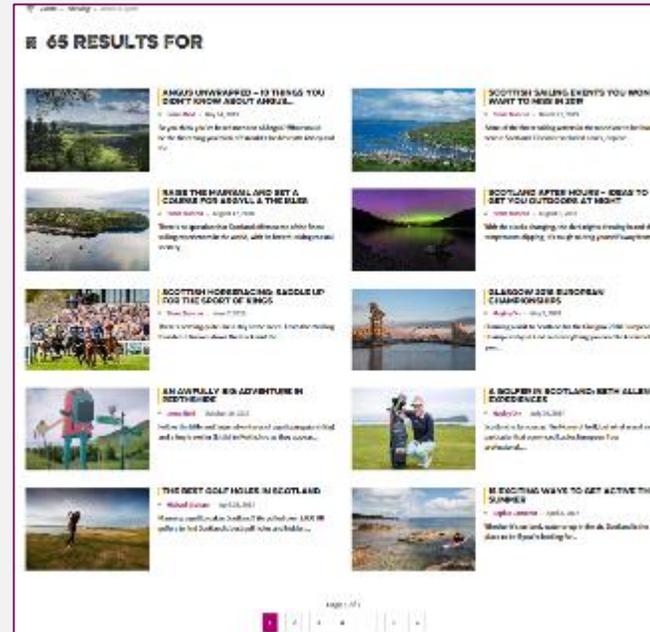
Other outdoor content activity



[Wildlife calendar e-Book](#)



[Adventure e-Book](#)



VisitScotland Blog

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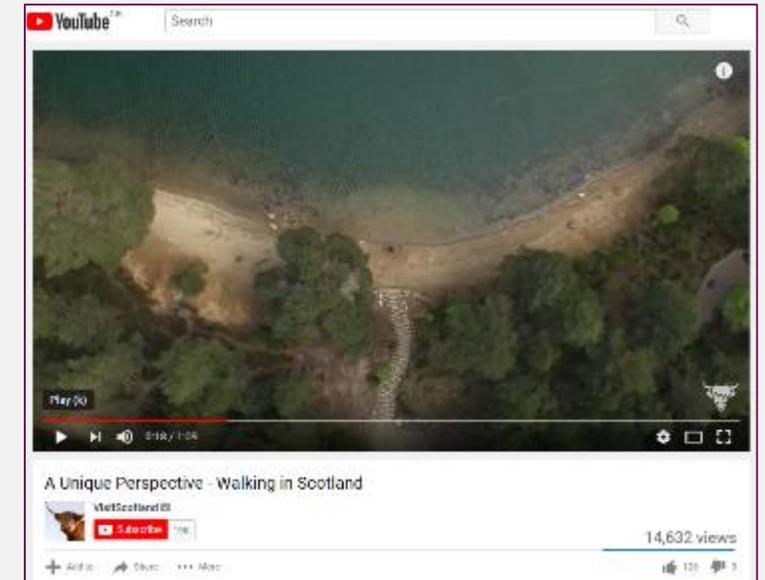
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[Sailing – Argyll & The Isles](#)

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[Scotland – a thrill-seekers' paradise](#)

Coming Soon ...

- Epic rides from the train blog post – DMBinS, Mark Beaumont, Sustrans
- Small promotional campaign for new Sustrans/NCN map – June/July
- Watersports for beginners blog post and supporting video - July
- Update Sail Scotland video (July), Year of Coasts & Waters video and webpage (October), adventure section, fishing and horse-riding/trekking webpages
- Possible NC500 Mark Beaumont cycling route itinerary page
- Longer term – updating VisitScotland Walkers' & Cyclists' Welcome Schemes



Thank You

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