

GLASGOW 2030 TOURISM STRATEGY

GROWING THE VALUE OF TOURISM
IN GLASGOW BY DELIVERING FOR
OUR VISITORS, OUR BUSINESSES,
OUR COMMUNITIES AND
THE ENVIRONMENT



EXECUTIVE SUMMARY

This strategy document has been developed based on in-depth research and in collaboration with a wide range of local and national partners. It sets out the core aims and ambitions for Glasgow's visitor economy in the period to 2030.

Five strategic priorities have been established in order to meet this vision and ambition which are aligned with the national tourism strategy Scotland Outlook 2030 and are aimed at supporting the City of Glasgow's wider economic goals. The five strategic priorities are to:

- 1. Increase the value of tourism to Glasgow's economy**
- 2. Enhance the experiences that we offer**
- 3. Create value for Glasgow's people through the tourism sector**
- 4. Support vibrant places across the city and surrounding region**
- 5. Deliver tourism in a sustainable and inclusive way**

With widespread collaboration, responsible management and investment, tourism plays an important role in the economy of Glasgow. This will help the city to become more sustainable, inclusive and accessible, become better connected and more innovative whilst supporting thriving neighbourhoods and boosting the city's status as a leading international events destination.

This strategy was developed as a collaboration between the following public sector partners, together with representatives from across Glasgow's tourism business community.

Glasgowlife



Visit Scotland | Alba™



**PEOPLE
MAKE
GLASGOW**



INTRODUCTION AND STRATEGIC CONTEXT

Who is this strategy for?

The strategy is intended to provide a strategic framework that will inform and shape the future of Glasgow's visitor economy through to 2030. Developed through a process of extensive consultations with diverse city stakeholders and research on resident sentiment, it is intended as a strategy for the city, from which a wide range of stakeholders will be able to take their lead.

Tourism; a key driver of the city's economy

Tourism makes a significant contribution to Glasgow's economic development, while helping to showcase the city to visitors as an ideal place to live, work, invest and study too. Visitors, like residents, also expect to enjoy an attractive public realm, good transport links and easy wayfinding between the city's many attractions. Glasgow also makes an ideal base for exploring the beautiful landscapes and heritage of the west of Scotland. For this reason the priorities and actions in this strategy have been developed to align clearly with the objectives and actions of Scotland Outlook 2030 and the following strategies in particular:

¹ Where the 'City Region' is referred to (both as a source of visitors and as a destination for visitor excursions, it is proposed that this scope matches the geographic scope of the City Region Strategy, which defines eight local authority areas: East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire.



© Glasgow Life. All rights reserved.

1

UN Sustainable Development Goals

The new Strategy and Action Plan contribute towards the achievement of the universal 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs), in particular:

GOAL 8 / Decent Work and Economic Growth

GOAL 11 / Sustainable Cities and Communities

GOAL 12 / Responsible Consumption and Production

GOAL 13 / Climate Action

2

Scotland's National Strategy for Economic Transformation (NSET)

Key industry opportunities (as defined by the Tourism Industry [Leadership Group](#)) include hosting and delivering major events; improved planning and decision making through the improved availability of data and insights, capitalising on the appetite from businesses to contribute to the net zero ambitions to drive productivity and improve customer experiences, Growing the Food Tourism proposition and supporting local food and drink producers and the Outdoors e.g. developing the offer on the River Clyde.

3

Scotland Outlook 2030 national tourism strategy

The Glasgow 2030 Tourism Strategy aims to deliver on Scotland Outlook 2030's three commitments:

1. Scotland's tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045;
2. We will ensure that tourism leads to improved community wellbeing and nurtures thriving places across Scotland.
3. 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 areas.

It has also been indicated where the actions set out in the Glasgow 2-year action plan are aligned with Scotland Outlook 2030's four strategic priorities (*Passionate People, Thriving Places, Memorable Experiences and Diverse Businesses*).

4

Glasgow City Region Economic Strategy (GCES) (2021)

Tourism, food, and leisure are specified as part of the 'Foundational Economy' that provides essential goods and services, and supports local well-being.

Tourism in Glasgow can also help to deliver on several of the 19 cross cutting actions in the strategy, including: increasing sustainable travel, supporting businesses to decarbonise and adapt, regenerate centres and communities, build a green supply chain, and increase residents' skills.

5

Glasgow Economic Strategy 2022-2030

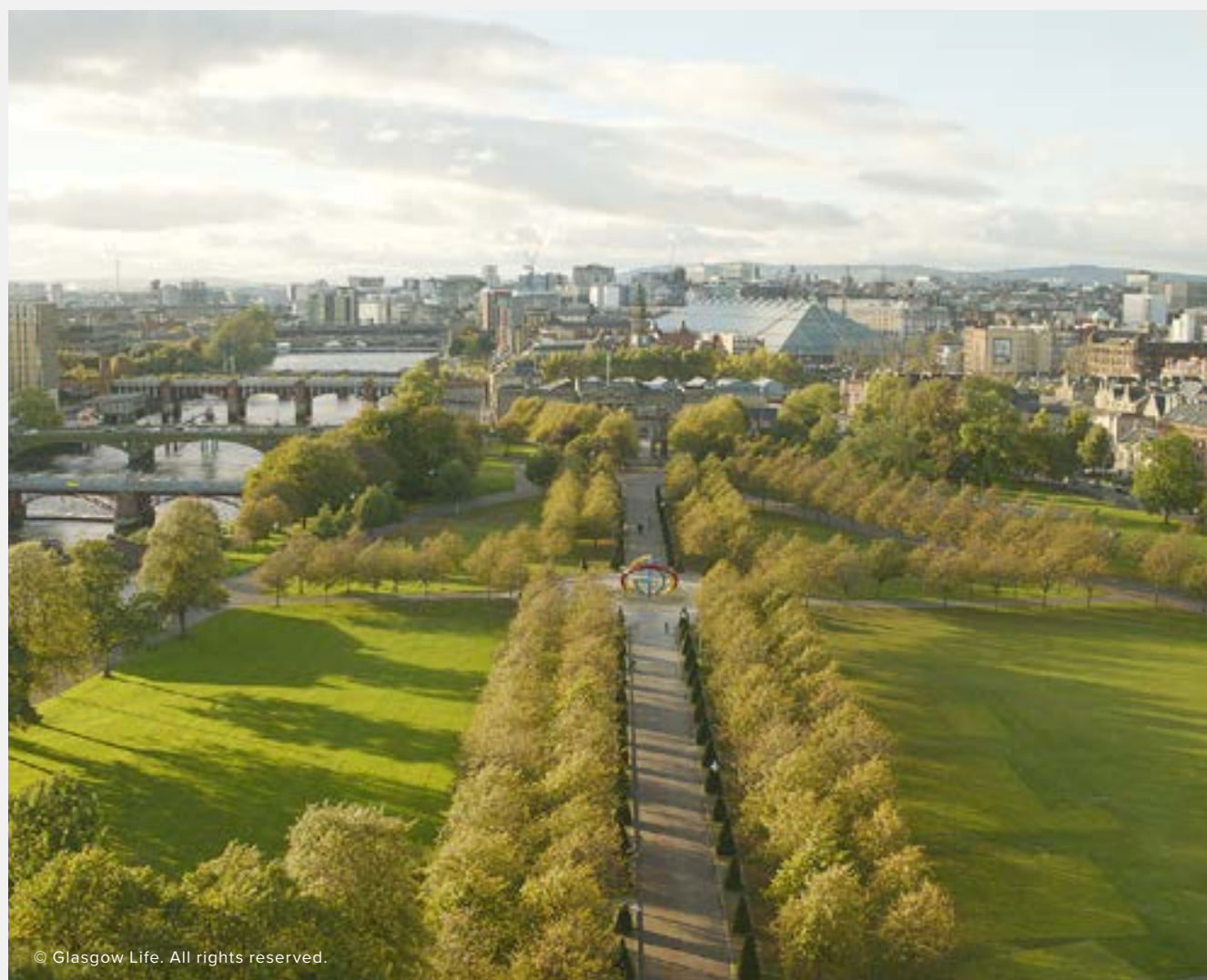
Tourism and the Creative Economy are identified in the Glasgow Economic Strategy as a key sector for the city's economy. The strategy also recognises the city's importance as a global events destination, and the assets that support this status (such as the Scottish Events Campus (SEC), Glasgow Airport and the City Centre) require investment in order for this status to be maintained. These are defined in the Strategy as the 'Key City Assets.' The Strategy also identified hospitality among the sectors that make up the city's 'Foundational Economy'.

6

The Glasgow Climate Plan (June 2021)

The city has a well-established policy framework and targets around climate action, poverty reduction and economic development.

In support of this, the actions of the previous Sustainable Tourism & Conventions Action Plan which centred around three strategic areas: (1) Building a Sustainable Tourism Sector (2) Developing Our City Offer, and (3) Showcasing Our City Destination will be integrated into the updated Glasgow Tourism Strategy.



© Glasgow Life. All rights reserved.

FACTORS SHAPING VISITOR DEMAND

Patterns of demand for visiting Glasgow are influenced by a wide range of broader factors such as awareness of Glasgow and what it offers, the city's reputation and positioning in the marketplace, its connectivity with source markets, the presence of a compelling range of products, and importantly, overall consumer confidence in the city's core markets.

The strategy development process included an analysis of key market, industry and consumer trends that are shaping demand for tourism in Glasgow, and their impact on the city. The existing research on the perceptions of the city among target audiences was also analysed, supported with further input and recommendations from VisitScotland on key markets, to better understand the factors shaping visitor demand.



© Glasgow Life. All rights reserved.

Glasgow's target leisure markets - overview

The table below shows those markets which have been identified (as a result of baseline research for this strategy and consultation sessions) as being most relevant to stimulating the growth of leisure tourism in Glasgow:

TARGET MARKETS

✓ **Residents of Glasgow City and Region**

✓ **UK leisure visitors**
All five VisitScotland target audiences:
Engaged Sightseers, Food-Loving Culturalists, Adventure Seekers, Curious Travellers, Natural Advocates. (Source locations identified by VS: Northern England, London and Southeast England)

✓ **International leisure visitors**
in particular those from the US, Canada, Germany and France

✓ **Business Extenders**
UK and International

✓ **Friends and relatives of UK and International students**

Based on the insights set out above, further research will be required to understand how perceptions of Glasgow and what it offers differ between different markets, and how this can be optimised in order to convert 'awareness' into 'intention to visit' the city.



FACTORS SHAPING VISITOR DEMAND TAKEAWAYS

Research and consultations carried out in the development of this strategy have established that:

- 1** As visitor flows continue to recover, it will be important for Glasgow's tourism stakeholders to share data and carry out research on trends in visitor demand that can help to inform product development and marketing efforts more effectively. (NB: this will be addressed in the two-year action plan)
- 2** Competition for UK city leisure tourism is strong. In order to stand out in a crowded marketplace Glasgow needs to work across all fronts in order to nurture the reputation of the city and ensure that it is front of mind among potential visitors. This requires stakeholders to build a clear proposition of what the city can uniquely offer, while also giving a positive overall impression of the city and how visitors will feel there
- 3** Touch points for learning about Glasgow can be multiple (from Food and Beverage brands to music bands, sports teams, artists and designers). Working with partners in these fields can help to define Glasgow's proposition, market the city and build curiosity among potential visitors
- 4** The city generally creates a positive impression for first time visitors, who go on to give positive word of mouth recommendations on social media. This underlines the importance of:
 - 1. The city ensuring a positive initial impression to visitors (e.g. by ensuring street cleanliness and well maintained public realm), and;**
 - 2. The link between tourism and broader economic development (as today's visitor may well be tomorrow's student, investor or skilled migrant)**
- 5** Given that reliance on the travel trade for trip inspiration, planning and booking has increased (particularly among international visitors) Glasgow needs to gain a stronger presence in the international travel trade marketplace. Bringing a compelling range of bookable experiences to market and showcasing Glasgow to a wider range of travel trade intermediaries.



THE EVOLUTION IN GLASGOW'S TOURISM SUPPLY - OPPORTUNITIES FOR GLASGOW

There are opportunities Glasgow can capitalise on that arise from a combination of external factors. This includes the stronger than expected recovery of UK inbound visitor spending and the steady growth in tourism employment in Scotland. In addition, the city itself has new developments in the leisure tourism offer and continues to advance its internationally-recognised sustainability achievements and status as a leading international events destination.

Glasgow has a huge amount to offer visitors, and the appeal of its accommodation, food and drink and attractions has continued to grow and evolve in recent years. Major events such as COP26 in 2021 and the UCI World Cycling Championships in 2023 have introduced greater numbers of international visitors to the city, and research has found that our reputation flourishes among those who've come here and seen with their own eyes what we have to offer.



© Glasgow Life. All rights reserved.



High quality accommodation:

The size, quality and range of facilities offered by our hotels continues to grow. Five new hotels opened in 2021 adding over 1000 beds (low to mid-range budget), and four in 2022. Over 20 new hotels are planned for 2023-25, nearly half of them 4 and 5 star. This is adding to the range and quality of accommodation available with potentially higher environmental standards (and as a result, an overall improvement in perceptions of the city in the eyes of investors and visitors).



Attractive places to spend time in:

As work on the Clyde Mission is progressed, improved access and public realm along the corridor of the River Clyde from the city centre to the sea will provide improved amenities such as active travel routes, places for visitors to eat and drink and outdoor activities - thus helping visitors to discover a new side to the city.



World-class facilities for major events:

Glasgow already has a strong, well-deserved name in the world of conferences and major events, and to stay competitive, continual investment is required to ensure that Glasgow stays ahead of the rest. This reflects the type of investment which is required to expand and upgrade facilities at the Scottish Events Campus. Plans approved in 2021 included new exhibition, conference and banqueting facilities added to the SEC Centre as well as upgrades to public spaces.



Glasgow's commitment to sustainability:

Its high position in international sustainability rankings and the status of a Global Green City awarded in 2020 has already contributed to winning an international bid to host big events, including COP26. Maintaining this high position is likely to encourage more events and more visitors to the city.



Reconnecting with the world:

The continuous research and investment in sustainability by Glasgow Airport and its ambitious net zero targets will contribute to the decarbonisation efforts of the tourism sector and to achieving the city's climate commitments. The change from being just a transport hub to becoming a hive of innovative economic activity has huge potential to support skills development, job creation and regional growth. Furthermore, international connections continue to be restored. As momentum builds and flows of international passengers are restored, this should support the case for year round connections with North America. In addition, a greater focus on rail connections will provide an alternative lower carbon means of travel for the city.



Offering what visitors are looking for:

VisitBritain's research (2022) has shown that the biggest drivers for visitors globally in choosing a destination are that it offers 'good value for money' and is a 'welcoming place to visit.' This puts Glasgow, with its welcoming locals and affordable accommodation in a great position to attract more international visitors.



Glasgow's gastronomic delights:

Glasgow is home to one of the best food and drink scenes in the UK. Consultations for this strategy confirmed that the city's extensive and multicultural food and drink offer as well as grassroots music culture are a source of pride for Glasgow's residents, and a definite draw for both residents and visitors that the city can capitalise on.

STRATEGIC FRAMEWORK

THE AMBITION OF THIS STRATEGY

“Together we will grow the value of tourism in Glasgow by delivering for our visitors, our businesses, our communities and the environment.”

Achieving this ambition is central to meeting Glasgow's climate action ambitions, and delivering on Scotland's national climate commitments. Today, sustainability has become a key point of competitiveness in tourism for cities around the world. Therefore, it is important for Glasgow to stand out as an exemplar city in the way that tourism is managed in environmental, social and economic terms. In concrete terms, this includes:

- ✓ Responding to the climate emergency by providing a low carbon offer of tourism products and services that bring positive environmental and social benefits and maintain the city's high position in international sustainability rankings
- ✓ Providing multiple opportunities for residents to benefit from a thriving visitor economy
- ✓ Creating experiences which bring value, spread visitors around the city, and offer good prospects for them to return again and again
- ✓ Being an inclusive and accessible destination for visitors with disabilities

THE STRATEGIC VISION OF THIS STRATEGY

“By 2030, tourism in Glasgow will make an even stronger contribution to making the city an attractive place for people to live in, invest in, study, and visit. The value of tourism to the city's economy will increase, as Glasgow attracts visitors who stay longer to enjoy the assets that make Glasgow unique. Above all, Glasgow will set an example for cities across the UK and internationally for the way that it delivers tourism experiences in a way that minimises carbon emissions while maximising benefits to communities and the local economy.”

CONDITIONS FOR SUCCESS

In order for Glasgow to capitalise fully on its 'lead drivers' and 'supporting experiences' (explained on p. 15) a series of conditions must be in place to enable both the public and private sectors to deliver high quality experiences that visitors and residents expect. For this reason, the majority of the conditions for success described below relate to Glasgow not only as a 'destination' for visitors but as a 'place' where people live, work, study and invest too.

With this in mind, to achieve this strategy, the principal delivery partners pledge to work in partnership to support and advocate for continual improvement in the visitor experience in the following ways.

- ➔ **City centre placemaking:** Supporting the delivery of the City Centre Strategy, to deliver a clean, safe city centre that is welcoming and offers a diverse and attractive range of services
- ➔ **Bringing the city to life through public events:** Supporting events that bring the city centre and other districts to life, in order to encourage dwell time and a broader leisure offer for residents and visitors
- ➔ **A connected city:** Ensuring that visitors are able to confidently navigate the city using public transport, walking and cycling with ease (this includes supporting the transition towards integrated ticketing across multiple modes of transport).
- ➔ **Creating an accessible city:** Helping to ensure that Glasgow is, first and foremost an accessible and inclusive city for its residents, with subsequent benefits for visitors who have additional mobility needs
- ➔ **Developing the range of viable and appealing days out in the city region:** Working with partners on aspects such as transport connectivity and responsible visitor management to ensure that Glasgow is a viable base for exploring further afield



© Glasgow Life. All rights reserved.



GLASGOW'S TOURISM ASSETS

Defining Glasgow's tourism assets can help the city's visitor economy stakeholders to articulate the city's product offer to visitors more clearly - and ensure that this offer is targeted towards the right audiences in the right place too.

Following stakeholder engagement held as part of this strategy development process, the following assets have been identified and arranged into two categories.

LEAD DRIVERS	Leading examples include....
Arts and culture	The Burrell Collection, Kelvingrove, Riverside Museum, Mackintosh, The People's Palace, architecture, cultural heritage, theatres including The Citizens, Tron and Tramway and contemporary art such as the CCA, GoMA and Glasgow School of Art.
Festivals and major events (sports, conferences, conventions)	Celtic Connections, Riverside Festival, Glasgow's Film and International Comedy Festivals, World Pipe Band Championships, Glasgow International and Glasgow Mela, COP26, 2023 UCI Cycling World Championships, 2024 World Science Fiction Convention, World Athletics Indoor Championships 24 and Euro 2028.
Major concerts, live music and nightlife	A wide variety of iconic music venues across the city playing globally recognised artists throughout the year including the OVO Hydro, Barrowland Ballroom, King Tuts and The Sub Club. TRNSMT Festival, Summer Nights at the Bandstand.
SUPPORTING EXPERIENCES	
Food and drink	Extensive and multicultural food and drink offer, wide variety of vegan restaurants
Quality accommodation	Expanding range of 4-5 star hotels, significantly increasing the city's year round capacity
Shopping	A strong selection of major brands complemented by independent shopping and markets
Parks and Gardens	Over 90 parks and gardens in the city centre as well as in the west end, east end and southside
Screen tourism	Popular filming location for Hollywood movies and TV shows due to the city's grid street system and varied architecture, such as Indiana Jones, Outlander, Borderland, The Flash, Tetris (all to be released in 2023)
Glasgow as a base to explore from	Wide range of accommodation and good transport links, making Glasgow a convenient base for exploring popular locations in the surrounding region

WHERE WE WILL FOCUS PRINCIPLES FOR DELIVERY

The following principles are recommended to guide all the partners involved in delivering this strategy. These principles flow from the strategy's ambition and vision described earlier in this document: in relation to the city's leisure tourism offer; the continuous work to keep the city's status as a leading international events destination; and the internationally recognised sustainability achievements.

All actions will be implemented, taking the following guiding principles into account:

- ➔ **Actions must be aligned with achieving the objectives of:**
 - National Strategy for Economic Transformation
 - Scotland Outlook 2030, the national tourism strategy
 - Glasgow's Climate Action Plan
 - Glasgow Economic Strategy 2022-2030
 - Glasgow City Region Economic Strategy
- ➔ **Everyone's included; all initiatives provide space and opportunities for those with disabilities and for those experiencing poorer economic outcomes to participate and contribute fully**
- ➔ **We take a Team Glasgow approach, with ever closer collaboration between public and private sectors**
- ➔ **Glasgow's people are informed and engaged in decisions on tourism development that affect them**

FIVE STRATEGIC PRIORITIES

This strategy is structured around five strategic priorities (see below), each aligned with Scotland Outlook 2030, and designed with the aim of supporting the delivery of the Glasgow Economic Strategy 2022-2030. On the following pages, a brief rationale is given to explain why these are a priority for Glasgow, followed by a series of action points that describe, in broad terms, how each priority will be addressed.

-  **1 Increase the value of tourism to Glasgow's economy**
-  **2 Enhance the experiences that we offer**
-  **3 Create value for Glasgow's people through the tourism sector**
-  **4 Support vibrant places across the city and surrounding region**
-  **5 Deliver tourism in a sustainable and inclusive way**

1

INCREASE THE VALUE OF TOURISM TO GLASGOW'S ECONOMY ('OUR DIVERSE BUSINESSES')

Glasgow Economic Strategy themes to be addressed

Growing our Economy; Inward Investment and Internationalisation; Innovation

Rationale

We must focus resources on nurturing those markets which will bring the most economic and social value to the city. This means targeting those markets with a higher spend per visitor, and encouraging these visitors to stay in the city for longer. It also means attracting visitors who appreciate the full range of what Glasgow has to offer.

We will do this by....

1. **Sharing insights on market intelligence, product innovation and other key areas to help businesses take informed decisions and promote the city**
2. **Carrying out research and facilitating partnerships that help us to understand those visitor markets which bring most value to the city**
3. **Ensuring that Glasgow is better positioned through promotion in these markets**
4. **Ensuring that Glasgow is as easily reachable as possible from these markets**

2

ENHANCE THE EXPERIENCES THAT WE OFFER ('OUR MEMORABLE EXPERIENCES')

Glasgow Economic Strategy themes to be addressed

Growing our Economy; Inward Investment and Internationalisation; Innovation; A Fairer Glasgow; Infrastructure and Place; Supporting Key City Assets

Rationale

In order to stand out among our competitors, it is important that we give visitors and residents compelling reasons to come into Glasgow - and to keep returning to the city. We must therefore continue to invest in our tourism assets and ensure that they are well positioned - both directly to consumers and through travel trade.

We will do this by....

1. **Exploring opportunities for developing new visitor experiences that increase the city's appeal**
2. **Increasing the number of high quality, bookable experiences**
3. **Ensuring that these experiences are well positioned in our key markets (direct to consumer and travel trade)**
4. **Encouraging greater exploration around the city**
5. **Developing an events calendar that appeals to visitors and local people throughout the year**

3

CREATE VALUE FOR GLASGOW'S PEOPLE THROUGH THE TOURISM SECTOR ('OUR PASSIONATE PEOPLE')

Glasgow Economic Strategy themes to be addressed

Growing our Economy; Employment and Skills; A Fairer Glasgow

Rationale

First and foremost, tourism should create value for Glasgow's people, for example by creating economic opportunities through fair work and improving skills. It should also create opportunities for Glaswegians to meet, socialise and for participation in the city's cultural life.

We will do this by....

1. **Ensuring that residents of Glasgow city region can get the most from the city by promoting days out, events, and celebrating the city's diverse communities**
2. **Highlighting opportunities for local people to develop their career in the visitor economy**
3. **Creating pathways into employment and increasing skills through volunteering (for example at major events)**

4

SUPPORT VIBRANT PLACES ACROSS THE CITY AND SURROUNDING REGION ('OUR THRIVING PLACES')

Glasgow Economic Strategy themes to be addressed

Growing our Economy; Inward Investment and Internationalisation; Innovation; A Fairer Glasgow; Infrastructure and Place; Supporting Key City Assets

Rationale

Glasgow is a diverse city, with many attractions that lie in the city centre and beyond it too. Glasgow also represents an appealing and practical base from which visitors to Scotland can explore the surrounding region - just as locals do. Demand from tourism can help to support communities in Glasgow and the wider city region. For the city to remain internationally appealing as a major events and leisure destination, its infrastructure (e.g. event venues, transport infrastructure) will also require sustained investment that can help to deliver wider benefits to the city and its people.

We will do this by....

1. **Supporting the case for investment in key assets such as the Scottish Events Campus, Glasgow Airport and City Centre**
2. **Creating new reasons for residents and visitors to visit the city centre more frequently**
3. **Working with local businesses and communities to increase the appeal of specific neighbourhoods for visitors**
4. **Strengthen Glasgow's position as the ideal base for exploring the city region and west of Scotland**

Glasgow Economic Strategy themes to be addressed

Developing a Green Economy; Innovation; City Investment and Financing; A Fairer Glasgow; Infrastructure and Place

Rationale

In order to meet Glasgow's climate action ambitions, as well as other national and local policy objectives, it is imperative that we deliver tourism in a sustainable and inclusive way. This means formally integrating the actions set out in the previous Glasgow Sustainable Tourism and Conventions Plan into this strategy, and ensuring that public and private sector partners are mobilised to implement them.

We will do this by....

1. **Building a sustainable tourism sector - by supporting industry**
2. **Developing Our City Offer – by strengthening our sustainable credentials and adapting processes to champion green change**
3. **Showcasing Our City Destination – celebrating and promoting successes**
4. **Improving the accessibility of Glasgow's hospitality venues, attractions and other visitor infrastructure**
5. **Ensuring that visitors with additional accessibility needs are able to plan and book their visit with ease**

PERFORMANCE MEASUREMENT HEADLINE INDICATORS

In line with policy changes at national level, it is recommended that Glasgow supports the sector on fair work and the living wage in line with the Glasgow Economic Strategy and Glasgow City Region Economic Strategy 2017-35 and adopts performance indicators that reflect the city's sustainable tourism ambitions. It will also be important for tourism stakeholders to explore new ways to gather and share city-level data on visitor motivations, behaviour and satisfaction.

Rationale for Target Setting

Glasgow will aim for a +/- 10% increase in the impact of the visitor economy by 2030, using the STEAM model as our methodology.

In order to set this % increase for the Glasgow 2030 Tourism strategy, city partners:

- Examined the city's historic STEAM data
- Reviewed existing and forthcoming hotel capacity
- Considered the ambition for Glasgow with a shift away from a volume/value focus to enhancing quality and extending stays
- Confirmed that the successful delivery of the 2-year action plan was critical
- Agreed that in 2025 the top-level economic impact indicators and targets will be reviewed to ensure that they continue to best reflect the ambition of the strategy.

Economic KPIs with 2024 and 2030 targets

We will aim for a +/- 10% increase in the impact of our visitor economy by 2030:

1. **Economic Value from Visitor Spend - £1.58bn** (2022 actual)
2024: £1.61bn / 2030: £1.74bn
2. **Overnight Visitors - 2.65 million visitors** (2022 actual)
2024: 2.71m / 2030: 2.91m
3. **Visitors stayed for 3.1 nights on average** (2022 actual)
2030: 3.4 nights
4. **Jobs - Locally, the tourism sector supports over 28,000 full time jobs** (2022 actual).
2024: 29,489 / 2030: 31,724

(Source: STEAM)

We will achieve this by delivering on the action plan and providing a wide range of quality, diverse experiences and assets which are easy to book online. Our digital destination presence will showcase the rich culture, events and music the city has to offer and campaigns will target our core markets, giving visitors reasons to extend their stay. City partners will work with industry to support the roll out of 3rd party green and accessibility accreditations. Investment in the city centre and its cultural assets will be delivered.

Please see the Glasgow 2030 Tourism Logic Model below which illustrates how the strategy will support the city to deliver outcomes and positive impact across the sector.

Glasgow 2030 Tourism Logic Model

Strategic Need	Inputs	Outputs	Outcomes	Impacts
<p>Average length of visitor overnight stay is short (3.1).</p> <p>Average overall spend of our overnight visitor market is relatively low at £953m compared to Manchester and Liverpool. Glasgow 25.9m overnights/Manchester 34.5m overnights/Liverpool 37.2m overnights.</p> <p>The number of jobs supported locally by the tourism sector.</p> <p>Strengthen the sustainable and inclusive practices of Glasgow as a destination.</p> <p>To support the tourism sector to be a more attractive career path.</p>	<p>Increase of online bookable quality, visitor experiences.</p> <p>Development of campaigns to target core European and international markets.</p> <p>Enhance destination digital platforms.</p> <p>Deliver a travel trade strategy to support group and independent travel to Glasgow.</p> <p>Development of Glasgow’s Cultural Strategy.</p> <p>Delivery of key priorities in the City Centre Strategy 2030 Delivery of Glasgow’s Event Strategy.</p> <p>City partners will work with industry to support the roll out of 3rd party green and accessibility accreditations through.</p> <p>Ongoing delivery of training and apprenticeships for young people in the sector.</p>	<p>Increased number of bookable, quality experiences available for visitors Glasgow’s profile will be increased to warm markets.</p> <p>The city’s digital destination presence will showcase the rich cultural, events and music on offer giving visitors reasons to extend their stay.</p> <p>Improvement in city centre urban fabric. Increased green spaces, active travel routes, cultural assets, food and drink offerings in city centre.</p> <p>Regular programme of city events and higher profile international events.</p> <p>Increased number of hotels and businesses with 3rd party green / access guides.</p> <p>Increased number of employees entering the sector.</p>	<p>Visitors will stay for longer.</p> <p>Visitor expenditure in the city and surrounding region will increase.</p> <p>Jobs will be supported in the tourism sector.</p> <p>More visitors to the city centre.</p> <p>Increased public transport usage by visitors.</p> <p>More cycle users.</p> <p>City retains competitive position in both the leisure and conventions market.</p>	<p>Reduced seasonality.</p> <p>The sector will play a key role in the city’s day and night-time economy.</p> <p>A city centre which provides a welcome and vibrant experience for residents and visitors.</p> <p>Delivering a sustainable and resilient visitor economy.</p> <p>Increased pride for residents.</p> <p>Enhanced experience for visitors and residents.</p>

In addition to the Economic Impact KPIs, the city will monitor and report on several other indicators as included in the table below. These provide a valuable measure for Glasgow against visitor spend, sustainability credentials on a city and business level, and for resident and visitor satisfaction.

Additional Baseline figures and headline KPIs:

KPI	YEAR	VALUE	COMMENTS / SOURCE
Average spend per overnight visit	2022	£359.62	STEAM annual figures.
Position within the Global Destination Sustainability Index	2022	8th place	GDSI ranking produced annually for over 100 participant destinations.
Resident sentiment on tourism	2022-23	Over 74%	The resident survey was conducted as part of the strategy development and serves as an indicative guide. Repeat surveys are planned on a biennial basis (2024) with a representative sample of Glasgow's population.
Visitor satisfaction	2024		A VisitScotland visitor survey is currently underway. Findings will be available in 2024. The survey is occasional, with the next survey to be conducted in 2029. Satisfaction levels will be measured on a 1-10 grading.
Number of tourism businesses with a 3rd party green accreditation.	2023	54 businesses	Business audit to be conducted annually.

The supporting action plan for this strategy will run from 2024 – 2026 and will include a range of measurable and timebound actions. The action plan will provide a more detailed reporting framework for deliverables under each of the 5 strategic priorities.

We would like to extend our sincere thanks to all the businesses, agencies and stakeholders who have supported and participated in the development of this strategy.

We would be pleased to hear from you, so please get in touch with the team if you would like more information.

Glasgow Life - Tourism

Anna Young
Senior Tourism Manager
anna.young@glasgowlife.org.uk
07551 270 816

Anne Marie Gray
Tourism Manager
anne-marie.gray@glasgowlife.org.uk
07796 075 872

VisitScotland

Lynne Cooper
Regional Director
Glasgow City Region - Destination Development
lynne.cooper@visitscotland.com
0141 247 5803

Craig Lawless
Industry Relationship Manager
craig.lawless@visitscotland.com
07775 033 731

PRODUCED IN COLLABORATION WITH:

TOPOSOPHY
PLACE MAKING & MARKETING AGENCY

Finalized strategy submitted by
TOPOSOPHY Ltd, June 2023.
Updated October 2023.