

AN EVALUATION OF THE SUCCESS OF SCOTLAND'S UNESCO TRAIL

July 2025



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visitscotland.com/things-to-do/unesco-trail

Executive Summary

Scotland's UNESCO Trail is the world's first national UNESCO trail. The digital trail has been an international success, winning prestigious awards, raising awareness of Scotland and Scotland's UNESCO designations and inspiring imitations across the world.

The UNESCO Trail promotes Scotland's UNESCO designations to tell Scotland's story (past, present and future) in an innovative, exciting, responsible and sustainable way. The trail was specifically designed to align with UNESCO's values of peace, education, and broader United Nations (UN) aims around sustainability. It has also highlighted Scotland's focus on responsible and sustainable tourism.

The UNESCO Trail has successfully delivered upon its original strategic objectives, especially celebrating UNESCO assets via tourism and events, applying sustainable tourism policies that directly contributed to the UN 2030 Sustainable Development Agenda and by providing a responsible tourism offering for conscientious travellers.

The trail has also been partly successful in inspiring residents, visitors and new audiences to participate in UNESCO Trail activities, encouraging geographical spread of visitors to different regions in Scotland and by helping to engage and involve local communities.

The design, promotion and characteristics of the UNESCO Trail has delivered prestigious UK and international awards for excellence in sustainable tourism.¹

Visitor feedback on the UNESCO Trail demonstrates high levels of visitor awareness across Scotland's key visitor markets. Significantly between approximately 31% and 46% of visitors stated the UNESCO Trail was an important factor in their decision to visit a UNESCO designation. The UNESCO Trail was particularly successful in raising awareness and influencing visits to rural and geographically peripheral UNESCO designations.

Perhaps the most significant indication of success is the worldwide interest in the concept of the UNESCO Trail, through workshops and presentations across multiple countries. This has helped market Scotland as a global leader in promoting UNESCO values and responsible, sustainable tourism practices through innovative and inspiring marketing campaigns.

The domestic and international profile, influence, impacts and awards all combine to demonstrate a strong contribution to the economic, social and environmental objectives set out in the UN Sustainable Development Goals (SDGs),² Scotland's National Strategy for Economic Transformation (NSET)³ and Scotland Outlook 2030, Scotland's national tourism strategy (SO2030).⁴

¹ Awards include the Wanderlust Sustainability Award (UK); Fondazione Santagata Award 2022 for sustainable development projects (Italy); and Tour Mag Responsible Travel Award "Césars du Voyage Responsable" (France)

² <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

³ Scotland's National Strategy for Economic Transformation - gov.scot

⁴ Scotland Outlook 2030 - Scotland's tourism strategy

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1.0

INTRODUCTION



Introduction

This report evaluates the success of Scotland's UNESCO Trail. It uses designation and visitor feedback to establish how the UNESCO Trail achieved its original strategic objectives and provided meaningful contribution to a wider range of global and national strategic objectives.

Headline results were presented to the UNESCO Scotland Group and Scottish Government colleagues in October 2024. This report was prepared to serve as a case study in the UK National Commission for UNESCO Resource Centre, for a range of audiences including: policymakers, tourism specialists, those working in sustainable development, and others working across the UNESCO space, including National Commissions, UNESCO designated sites, and UNESCO Secretariat.⁵ It also provides a record for Scottish Ministers of the successful outcomes from a unique and inspiring project.

This evaluation provides the necessary background to UNESCO, Scotland's UNESCO designations and the UNESCO Trail. It also provides a high-level overview of the UNESCO Trail marketing strategy and specific marketing objectives and activity. The evaluation compliments a separate detailed marketing highlights report available on [VisitScotland's website](#).⁶

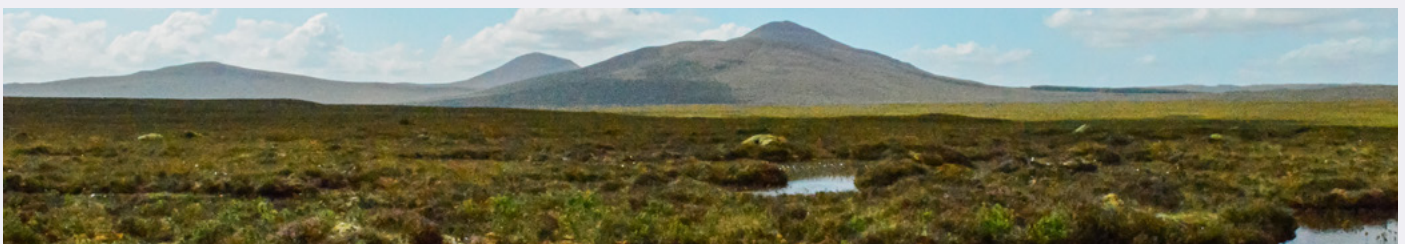
Available data, designation monitoring systems, monetary resources and the unconventional nature of the project and the fact that few designations are principally tourism attractions/businesses, influenced the evaluation approach and provided some limitations to the scope of the assessment. This evaluation is not therefore a conventional economic indicator-based evaluation.

The evaluation approach relies on designation feedback and visitor responses from VisitScotland's CRM database and provides an indicative, but representative, account of the range of impacts and outcomes.

All available evidence is then assessed alongside the UNESCO Trail's strategic objectives and global and national policy and strategy objectives. This approach clearly demonstrates where the UNESCO Trail has contributed greatest influence and impact.

The remaining report is structured as follows:

- **Chapter 2** – UNESCO Trail objectives, marketing strategy and specific activity
- **Chapter 3** – Evaluation approach
- **Chapter 4** – Designation impacts
- **Chapter 5** – Visitor influence
- **Chapter 6** – Strategic contribution



⁵ Case - Studies - UNESCO UK

⁶ Scotland's UNESCO trail | The marketing results - News | [VisitScotland.org](#)

2.0

BACKGROUND



Background

2.1 United Nations

The United Nations (UN) is an intergovernmental organisation that aims to: Maintain international peace and security

- Develop friendly relations among nations and countries
- Achieve international cooperation
- Serve as a centre for coordinating the actions of member states.⁷

The UN is widely recognised as the world's largest international organisation.

2.2 UNESCO

UNESCO stands for 'United Nations Educational, Scientific and Cultural Organisation.'

Formed in 1945, UNESCO is a specialised agency of the UN focused on promoting peace, sustainable development, and human rights, by encouraging collaboration and discussion between nations in culture, education, science and communication and information.

UNESCO focuses on education, the environment, social inequality, communication, and the exchange of knowledge.

One way it tackles some of these challenges is by identifying the world's most special places. By raising awareness of these sites, UNESCO can :

- Encourage investment and create jobs
- Spur technological innovation and scientific progress
- Enhance the world's cultural and environmental diversity

2.3 Scotland's UNESCO Sites

Figure 2.1: shows Scotland's diverse network of 16 UNESCO Designations.

Figure 2.1: Scotland's UNESCO Designations by UNESCO Classification

Global Geoparks

- Geopark Shetland
- North West Highlands Geopark
- Arran Global Geopark

Biospheres

- Galloway & Southern Ayrshire Biosphere
- Wester Ross Biosphere

Creative Cities

- Edinburgh UNESCO City of Literature
- Glasgow UNESCO City of Music
- Dundee UNESCO City of Design
- Perth UNESCO City of Craft & Folk Art

World Heritage Sites

- Antonine Wall
- Heart of Neolithic Orkney
- New Lanark
- Old & New Towns of Edinburgh
- St Kilda
- The Flow Country
- The Forth Bridge

⁷The member states of the United Nations comprise 193 sovereign states.

Table 2.1 provides a description of each type of UNESCO designation and the benefits of UNESCO membership.

Table 2.2 overleaf provides a brief description of Scotland's UNESCO sites.

Table 2.1: Description of UNESCO and Benefits of UNESCO Membership

Designation Classification	Description	Benefits of UNESCO Membership
Biosphere Reserve	Internationally designated protected areas (e.g. nature reserves/ biospheres) which demonstrate a balanced relationship between people and nature	<ul style="list-style-type: none"> • Promotes sustainable development and biodiversity conservation • Supports ecotourism, green marketing of businesses and the wider economic development of the region • Bring new ideas, opportunities and ways of working to the UK from the global network • Test new development theories and conservation approaches • Promote meaningful lifestyle changes through community engagement
Creative Cities	Cities where culture and creativity have been prominent strategic drivers of sustainable urban development	<ul style="list-style-type: none"> • Creates a positive, shared identity for the city • Promotes community integration and participation of minority or vulnerable groups • Develops local partnerships, projects and opportunities • Develops international partnerships, projects and opportunities
Global Geoparks	Areas of geological and scientific importance	<ul style="list-style-type: none"> • New funding opportunities • International programme and partnership opportunities • Local partnership opportunities • Influence in local development plans
World Heritage Sites	Landmarks and areas with cultural, historical, or scientific significance and considered to be of outstanding value to humanity	<ul style="list-style-type: none"> • Enhanced appreciation of heritage among residents by elevating from a local context into a global context • A world class tourist destination and enhanced visitor experience • Local partnership working • Improved local development plans • Social and economic regeneration

Table 2.2 provides a brief description of Scotland's UNESCO sites and outlines their broad visitor appeal.

New Lanark is the only designation that can be considered a formal visitor attraction with a bespoke visitor centre. By contrast visitor numbers to St Kilda are strictly controlled for environmental conservation reasons. The remaining designations are a mixture of land and sea habitats and city centre areas that also provide a vast range of interest and appeal for visitors. Most are large boundary sites that include a range of visitor attractions (both free and paid-for), large settlements, nature and cultural landscapes.

A key part of the Trail development was looking at how UNESCO sites, as partnership bodies, could work with tourism stakeholders across their site through the Trail. This included working with sustainable businesses, and for the first time, advertising bookable products across UNESCO sites that meet sustainability standards without compromising UNESCO's values.

Table 2.2: Characteristics and Visitor Appeal of Scotland's UNESCO Sites

Site	Site Characteristics and Visitor Appeal
Biosphere Reserves	
Galloway & Southern Ayrshire Biosphere ⁸	Covers c.9,700km ² of southwest Scotland with a population of over 100,000. Status granted in recognition of the special natural qualities that characterise the area. Work in the Core Area ⁹ is focused on research and the protection of species, habitats, landscapes and ecosystems. Beyond the Core Area the Biosphere accommodates historic industries (i.e., farming, fishing and forestry) and a variety of micro to medium sized business and settlements. The area is characterised by coastlines, rivers and forests and provides a range of potential outdoor activities and geological and historical areas of interest. The area is also renowned for its dark skies.
Wester Ross Biosphere ¹⁰	The Wester Ross Biosphere is contained within a remote mountainous region which is one of the UK's most scenic and least-populated areas with c. 8,000 people living within c.5,200km ² . The natural landscape is the major attraction, dominated by mountains, forests, waterfalls, seascapes and lochs. The area is also home to a wide range of highly valued wildlife and plant species of international significance. The areas visitor appeal is linked to slow tourism associated with connecting with the environment and discovering authentic Highland culture and tradition. Cycling, walking or kayaking are considered ideal ways of engaging with the area.
Creative Cities	
Dundee: Creative City of Design	Once renowned throughout the world for its textile and shipbuilding industries, Dundee has transformed into a cutting-edge centre of design. It is now an important hub for medical research, fashion, journalism and video games. Dundee's design related visitor offer includes the V&A Museum (Scotland's first design museum) and various theatres, art galleries, museums, street art trails and the science centre.
Edinburgh: Creative City of Literature	Storytelling and the written word have been the life force of Edinburgh's art and culture for centuries. Its contributions to the world of literature are so rich and well-regarded that in 2004, Edinburgh became the world's first UNESCO City of Literature. Edinburgh hosts the world's largest literature festival and offers a myriad of bookshops, smaller literature festivals and events, literary statues, monuments and museums (e.g., The Writers' Museum, Scottish Storytelling Centre, and the Scottish Poetry Library). Visitors can further engage with literature through bespoke tours and trails that celebrate literary figures and those who have been marginalised by history.

Site	Site Characteristics and Visitor Appeal
Glasgow: Creative City of Music	Glasgow is one of the largest and most accessible music scenes in the world. It became the UK's first (and world's third) UNESCO City of Music in 2008. This designation highlights Glasgow's diverse culture, history, and musical identity. These characteristics ensure Glasgow is a globally distinctive city for music. Glasgow hosts over 100 weekly live music events in a range of iconic venues from reborn Victorian civic halls, repurposed religious buildings and iconic venues such as King Tuts Wah Wah Hut and the Barrowlands, to the OVO Hydro which is regularly reported to be one of the world's busiest live entertainment arenas.
Perth: Creative City of Craft & Folk Art	Perth is the UK's first UNESCO City of Craft and Folk Art. The city's history and character is woven throughout its grand museums, art galleries, outdoor installations, and trails. Scotland's UNESCO Trail was launched in October 2021 and Perth was subsequently awarded UNESCO status in November 2021. Promotional materials were developed after the UNESCO Trail was launched. Perth is now promoted as part of the UNESCO Trail but is not part of this evaluation.

Global Geoparks

Arran Global Geopark	Arran is an island off the southwest coast of Scotland, known as 'Scotland in Miniature'. The geopark area spans 1,000km ² encompassing both land and sea and has a population of c.3,500. The Island straddles a major fault that once divided continents and showcases significant events in geological history. Arran's youngest rocks record the opening of the Atlantic Ocean. Arran has been described by the Geological Society as "one of the best locations for fieldwork in Europe", emphasising the islands importance to the history of geological science. Arran offers visitors a rich natural environment coupled with plentiful wildlife, world famous produce and abundant space to embrace island life. Arran Global Geopark was granted UNESCO status in April 2025 and is not part of this evaluation.
North West Highlands Geopark	Spanning over 2,000km ² the North West Highlands Geopark is a prehistoric landscape of outstanding natural beauty. Its geological heritage is considered to be among the most precious in the world.
Geopark Shetland	Spanning three billion years, the geology of Shetland forms one of the most spectacular and diverse landscapes in Europe and includes three of Northern Europe's most important examples of prehistoric architecture. The islands of Shetland have been on an extraordinary geological journey with the land traveling from near the South Pole, across the equator, to its current location at the crossroads of the North Atlantic and the North Sea. Visitors can walk on an ancient ocean floor, explore an extinct volcano and discover some of the 100 geosites. Visitors can also examine the areas rich human history, with evidence of Neolithic, Viking, and more recent settlements

World Heritage Sites

Antonine Wall: Frontiers of the Roman Empire	The Antonine Wall marked the final northern frontier of the Roman Empire. Built in 142 AD the wall was lined by 17 forts and patrolled by 7,000 soldiers. The wall stretched 63 km across central Scotland from Firth of Clyde on the west coast to the Firth of Forth in the east coast. The best preserved and most visible sections remain along the 8 km stretch in Falkirk, however, the remains of forts, ramparts and bathhouses can be seen at a variety of other locations. Visitor tours, museums, and remaining forts/castles and viewpoints provide insight into the ingenuity of Roman infrastructure and the everyday life of a Roman soldier.
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Site	Site Characteristics and Visitor Appeal
Hearth of Neolithic Orkney	Around 5,000 years ago, the prehistoric people of Orkney began building monuments and landmarks out of stone. The Heart of Neolithic Orkney brings together four key monumental sites. It is a collection of the best-preserved New Stone Age sites found in western Europe and provides outstanding examples of architecture that illustrate a significant stage in human history. Visitors can explore the monuments and ruins and the prehistoric landscape and history of Orkney.
New Lanark	This 18th century mill village is the vision of philanthropist and social reformer, Robert Owen. It was purpose-built as an ideal working and living environment for labourers and their families (e.g., shorter working days, an end to child labour under the age of 10, and free medical care). It became a world-renowned blueprint for what could be the ideal working and living environment for workers and their families. New Lanark mill village is a formal visitor attraction with a visitor centre and visitor gardens.
Old and New Towns of Edinburgh	Edinburgh's historic heart is considered to be one of the world's most striking and architecturally significant cities due to the dramatic contrast of its Old and New Towns. The city displays unique built heritage, from labyrinthine closes and passageways of the Old Town to the elegant boulevards and grand symmetry of the New Town. The built heritage continues to serve as a spellbinding backdrop to a vibrant cultural scene. World-renowned museums and galleries tell the story of the people who have built, worked and lived in Edinburgh's Old and New Towns.
St Kilda	St Kilda is composed of five unique islands in the Outer Hebrides and is home to a compact, dramatic landscape and unique human story. It is the UK's only dual World Heritage site. Its location and oceanic climate allow it to support an array of wildlife and ecosystems. The islands human inhabitants were evacuated in 1930, when the last 36 islanders voted to leave as their way of life was no longer sustainable. St Kilda is now inhabited by just a few staff members of the National Trust for Scotland and Ministry of Defence, and a small number of researchers. The heritage site is a protected environment and cannot accommodate a large number of visitors. Tours by boat are available but availability is strictly controlled. Attractions and exhibitions on the main Outer Hebridean islands promote St Kilda's history.
The Flow Country	The Flow Country is one of Scotland's most important natural resources and the first and only peatland World Heritage Site in the world. The 4,000km ² area is a vast expanse of blanket bog, sheltered straths, moorland, and mountains, stretching across Sutherland and Caithness. It is considered an ideal space for slow and responsible tourism where visitors can explore the landscape on trails and walking routes and learn about the area's history, local nature and wildlife habitats through visitor centres. The Flow Country was granted UNESCO status in July 2024 and is not part of this evaluation.
The Forth Bridge	The Forth Bridge is a unique icon of Scotland and technological human-made wonder. Spanning the Firth of Forth, the iconic Forth Bridge stands as a seminal moment in the history of engineering. It remains one of the world's longest-ever cantilever bridges. The Forth Bridge benefits from a favourable location surrounded by quaint towns and villages offering picturesque panorama and range of trails, circular walks and viewpoint locations.

⁸ <https://www.gsabiosphere.org.uk/our-unesco-biosphere/>

⁹ UNESCO Biospheres are split into three main zone (<https://www.unesco.org/en/mab/wnbr/about>)

¹⁰ <https://www.wrb.scot/why-wester-ross>

2.4 Scotland's UNESCO Trail

Scotland's UNESCO Trail is a digital trail launched in October 2021 and was the world's first ever national UNESCO trail. At this time, it included all 13 of Scotland's established UNESCO designated sites. The Flow Country Perth City of Craft and Folk Art and Arran Global Geopark have have subsequently been added to the reworked UNESCO Trail microsite on VisitScotland.com.

The UNESCO "badge" is globally recognised as shorthand for high-quality. It demonstrates that a place, item, or location is unique and of global significance and interest. The creation of Scotland's UNESCO Trail therefore provides a new highly credible way of telling Scotland's story (past, present and future) in an innovative, exciting and responsible way as the trail aligns with UNESCO's values of peace, education, and sustainability, as well as Scotland's focus on responsible and sustainable tourism.

2.5 Overall Strategic Objectives

The UNESCO Trail Strategic Business Plan (2020) outlined the following specific objectives:

- Encourage collaborative working between designations and the wider tourism sector
- Promote the UNESCO values
- Raise the profile of Scotland's UNESCO assets locally, nationally and internationally
- Provide opportunities to celebrate UNESCO assets via tourism and events
- Apply sustainable tourism policies to contribute to Sustainable Development Goals
- Aid in the recovery of tourism by providing a responsible tourism offering for mindful travellers

- Inspire residents, visitors and new audiences to participate in UNESCO Trail activities
- Encourage geographical spread of visitors to the different regions
- Engage with and involve local communities
- Increase the value of visitors to UNESCO sites (e.g., stay longer and spend more locally, improving, in turn, the quality of life of those communities)

2.6 Marketing Strategy, Objectives and Specific Activity

Marketing Strategy

VisitScotland's marketing strategy was to maximise the opportunity of the creation of Scotland's UNESCO Trail to:

- Help position Scotland as a sustainable and responsible destination of choice in key target markets
- Showcasing Scotland's distinctive history and archaeology, alongside our cultural, built and natural heritage
- Encourage geographical and seasonal spread of visitors
- Capitalise on the strong strategic fit between the Trail, UNESCO and VisitScotland sustainable and responsible tourism objectives



Marketing Objectives

VisitScotland had the following specific marketing objectives:

- Raise awareness of Scotland's UNESCO Trail
- Maximise reach through VisitScotland channels
- Drive traffic to a dedicated UNESCO Trail microsite
- Engage industry in Scotland
- Enhance the profile of Scotland as a sustainable and responsible tourism destination
- Generate video content

Marketing Activity

The UNESCO Trail was promoted through the following paid promotional activity and VisitScotland own channel activity:

- Paid Promotion
 - Digital display advertising
 - Paid social media activity
 - Publishing partnerships
 - Skyscanner promotion
 - UK influencer activity
 - Press trips (UK, France and Germany)
- VisitScotland Channel Activity
 - VisitScotland.com content creation
 - VisitScotland social channels
 - VisitScotland E-newsletters

2.7 Wider Impacts

Each designation is individually promoted recognising their internationally significant cultural, natural or built heritage value. Significantly however, the following aspects are also promoted to ensure a wider range of benefits are experienced:

- Similar designations or other designations within close proximity
- The immediate area and wider environs
- Local businesses - identifying sustainable characteristics and opportunities for businesses to contribute or be involved
- Eco-friendly attractions and accommodation options
- Transport and logistics information

Promoting these aspects helps to encourage visitors to engage in slow and responsible tourism behaviours. These efforts also encourage longer stays, higher spending and greater levels of visitor satisfaction. This is consistent with VisitScotland's '4S' approach (spread; spend; sustainability and satisfaction).

2.8 Partnership Working

The UNESCO Trail was a unique and global-first partnership between government, the UK National Commission for UNESCO and a range of public sector bodies.

Key stakeholders included:

- Scottish Government
- UK National Commission for UNESCO
- Scotland's UNESCO designation representatives
- VisitScotland
- Historic Environment Scotland
- NatureScot
- The National Trust for Scotland.

3.0

EVALUATION APPROACH



Evaluation Approach

3.1 Scope of Assessment

The project did not have budget for additional agency support ¹¹ and relied on pre-existing visitor survey mechanisms and feedback from designations on perceived impacts supported by any available evidence or data.

Figure 3.1 shows the approach used for the assessment which involved the following distinct stages.

Stage 1 – Designation Impacts

Representatives from each designation were invited to engage in consultations in 2023 to outline how each designation was benefiting from the UNESCO Trail. This was followed up with a detailed evaluation questionnaire in 2024 that sought to assess the extent to which the UNESCO Trail achieved its original strategic objectives (section 2.5). The questionnaire is provided in Appendix 1.

Stage 2 – Visitor Influence

Each year VisitScotland surveys a statistically representative number of contacts from our CRM (customer relationship management) database. This provides valuable insight on visitor motivations and awareness of marketing campaigns and promotions.

UNESCO Trail awareness, importance and visitation questions were asked in 2024 for international visitors and in 2023 and 2024 for domestic visitors. The questions are provided in Appendix 2

Stage 3 – Policy Contribution

Designation and visitor impact evidence collected in Stage 1 and Stage 2 were then used to inform how the UNESCO Trail had contributed to key international and national policy and strategy objectives namely:

- UN Sustainable Development Goals (UNSDGs)
- Scotland's National Strategy for Economic Transformation (NSET)
- Scotland Outlook 2030 – Scotland's National Tourism Strategy (SO2030)



¹¹ E.g., in person survey work at key points for each designation

Figure 3.1: Approach – Stages 1- 3

Stage 1		Stage 2		Stage 3
Designation Impacts		Visitor Influence		Policy Contribution
Designation Survey <ul style="list-style-type: none">Approved by Steering GroupQuestion to assess the extent to which the UNESCO Trail achieved strategic objectivesIndividual or collective response from each designation100% response rate from all 13 designations	+	VisitScotland Conversion Study <ul style="list-style-type: none">930,000 contacts (retained Enews & paid & organic acquisitions)UNESCO Trail feedback from: Domestic market & Short-haul and long-haul markets	=	Impacts expressed through contribution to key national & international economic, social and environmental policy objectives: <ul style="list-style-type: none">Scotland's Strategy for Economic Transformation (NSET)United Nations Sustainable Development Goals (UNSDG's)Scotland's National Tourism Strategy (SO2030)
	PLUS		EQUALS	

3.2 Economic Impacts

This evaluation is not an economic impact study. This is due to:

- The lack of appropriate designation visitor measurement data (i.e. designation visitor data containing UNESCO Trail influence questions)
- Issues defining attribution
- The unconventional nature of the UNESCO Trail
- The nature of the designations (i.e. with the exception of New Lanark, Scotland’s UNESCO designations are not formal dedicated visitor attractions or businesses).

A limitation of this study is therefore that designation benefits, impacts and visitor influence cannot be converted into precise net additional visitor numbers, visitor spend, or gross value added.



3.3 Marketing Impacts

This evaluation focuses on visitor and designation impacts, not marketing highlights.

Marketing results were reported separately and are available [here](#). High level example information is provided overleaf (Figures 3.2 and 3.3).

Figure 3.2 UNESCO Campaign Paid Marketing Activity Highlights

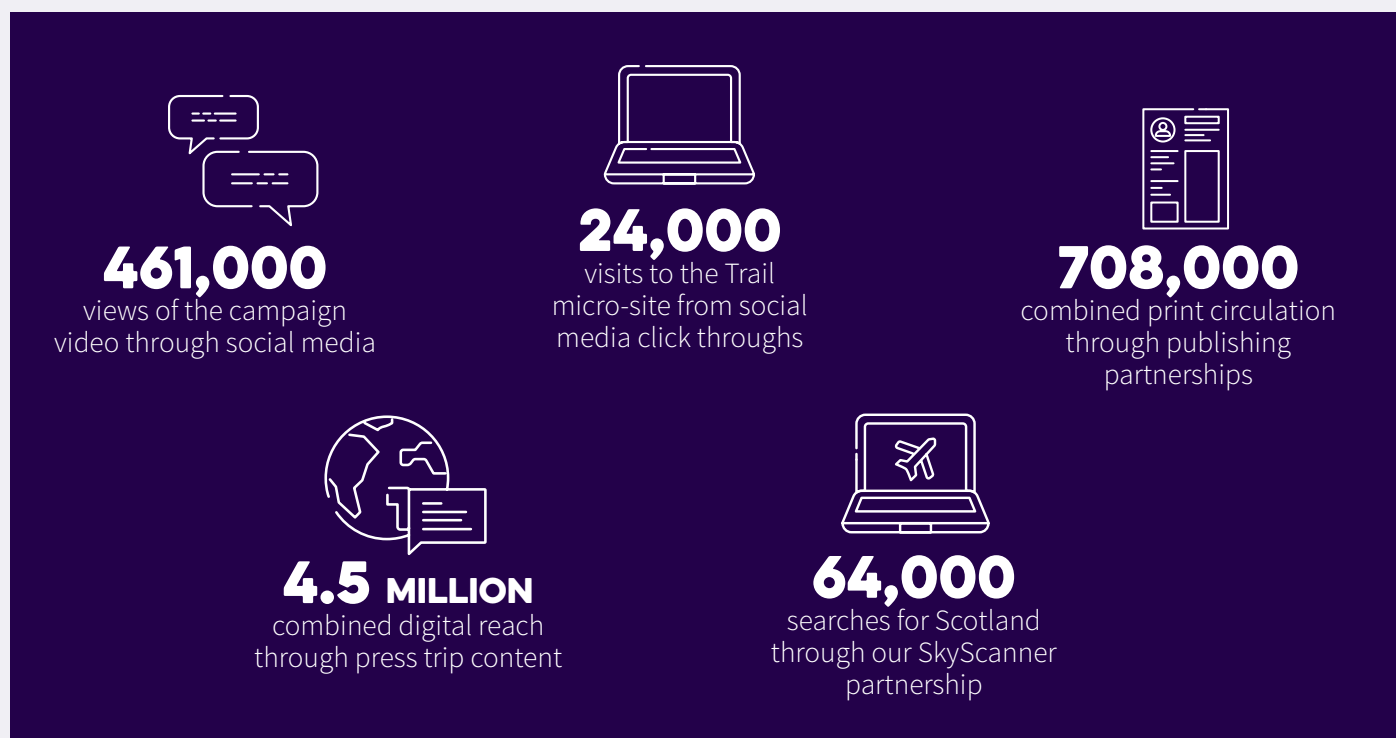


Figure 3.3 VisitScotland.com Own Channel Campaign Highlights



4.0

STAGE 1 - DESIGNATION IMPACTS



Stage 1 - Designation Impacts

4.1 Approach

Designations were asked to what extent they agreed the UNESCO Trail had delivered its original strategic objectives.

Potential responses ranged from strongly agree; somewhat agree; neither agree or disagree; somewhat disagree; strongly disagree and don't know.

Designations were then asked to explain and qualify their answers and provide available evidence, data and/or information to support their reasoning and judgement.

This approach was adopted to offset methodology issues around collecting consistent impact information for a range of contrasting designations that in the main lacked the necessary monitoring information for an impact assessment. Collecting information in this way permitted a way of reporting impacts that used directly comparable terminology.

4.2 Response Rate

The designation impact survey was carried out during spring 2024 and received a full 100% response rate from all 13 UNESCO designations.

4.3 Reporting Format

The tables used to show designation impacts use conditional formatting to highlight high and low values and express impacts in terms of the proportion of designations rather than number of designations for ease of analysis, interpretation and reporting.¹²

This section contains the following distinct summary tables and analysis:

- Table 4.1 aggregates responses into 'agree' and 'disagree'
- Table 4.2 provides a more detailed breakdown by strength of agreement
- Table 4.3 provides a summary of all evidence provided for each strategic objective
- Table 4.3 also provides a selection of key comments from designations to help illustrate the nature of specific impacts

4.4 Headline Results

Table 4.1 shows there was a high level of agreement that the UNESCO Trail achieved its original strategic objectives.

All designations agreed the UNESCO Trail had fulfilled its collaboration objective (100%), which was achieved through establishing new productive working relationships between designations and the wider tourism sector. Most designations also agreed the UNESCO Trail has successfully promoted UNESCO values (92%) and raised the profile of Scotland's UNESCO assets locally, nationally and internationally (85%).

There was however less knowledge of some impacts. This was mainly attributed to data and information gaps due to the unique nature of some designations (i.e. few sites are principally tourism destinations).

¹² 100% = all 13 designations,

Having said this, most designations still reported positive impacts, especially celebrating UNESCO assets via tourism and events (77%), applying sustainable tourism policies that directly contributed to UN Sustainable Development Goals (67%) and providing a responsible tourism offering for mindful travellers (54%).

Around half of the designations also stated the UNESCO Trail had inspired residents, visitors and new audiences to participate in UNESCO Trail activities (50%), encouraged geographical spread of visitors to the different regions (46%) and helped engage and involve local communities (also 46%).

The main issue for some uncertainty ('neither agree nor disagree' or 'don't' know responses) related to a lack of designation measurement tools and data to record certain impacts. The original 'value' objective for example required an understanding of extended stay, local spend and 'quality of life' of local communities.¹³ Understanding and evidencing this aspect of value was problematic and would have required specific community and business engagement programmes, additional resource and bespoke monitoring systems for each designation that could be linked to the attribution of the UNESCO Trail.

Table 4.1 Strength of Agreement – Headline Results

UNESCO Trial Impact	Agree	Disagree	Neither agree nor disagree	Don't know
Collaborate	100%	0%	0%	0%
UNESCO values	92%	0%	8%	0%
Profile	85%	0%	0%	15%
Celebrate	77%	0%	15%	8%
Sustainable tourism	67%	0%	25%	8%
Responsible tourism	54%	0%	31%	15%
Participate	50%	0%	33%	17%
Geographic spread	46%	8%	31%	15%
Communities	46%	8%	23%	23%
Value	23%	8%	46%	23%

¹³ Wider non-monetary value impacts were perceived to be through: collaborations and feeling part of a wider network; positioning and profile on an international basis but also within Scotland for some of the lesser-known sites; and a sense of pride being associated with a positive, innovative and influential project

4.5 Detailed Results

The scale of agreement/ disagreement reported by each designation can be broken down further to provide an additional level of insight (i.e., ‘strongly’ or ‘somewhat’). Table 4.2 shows the overall agreement is compellingly positive. Collaborate, promote, profile, celebrate and sustainable tourism objectives were relatively even or similarly balanced between ‘strongly’ and ‘somewhat’ agree.

The only variances from negative responses related to:

- Communities (‘strongly disagree’) – There was a reported lack of financial resources (with ‘core hours already overstretched’) to adequately involve communities (the designation respondent qualified this by also stating ‘this is not negative to the trail’)

- Geographic spread (‘somewhat disagree’) – A ‘rail or bus guide’ was suggested by one designation as a feature that would have helped promote geographic spread (please note a Journey Planner with journey times, transport & accommodation options and other attractions was included in the UNESCO Trail microsite)
- Value (‘somewhat disagree’) – Issues with measurement in a strict visitor impact sense and a lack of data to understand the influence on visitors to the area and the impact of the UNESCO status and the UNESCO Trail

Table 4.2: Strength of Agreement – Detailed Results

THE UNESCO trail has	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Encouraged collaborative working between designations and the wider tourism sector	46%	54%	0%	0%	0%	0%
Promoted the UNESCO values	46%	46%	8%	0%	0%	0%
Raised the profile of Scotland's UNESCO assets locally, nationally and internationally	46%	38%	0%	0%	0%	15%
Provided opportunities to celebrate UNESCO assets via tourism and events	23%	54%	15%	0%	0%	8%
Apply sustainable tourism policies to contribute to Sustainable Development Goals	42%	25%	25%	0%	0%	8%
Aided in the recovery of tourism by providing a responsible tourism offering for mindful travellers	8%	46%	31%	0%	0%	15%
Inspired residents, visitors and new audiences to participate in UNESCO Trail activities	8%	42%	33%	0%	0%	17%
Encouraged geographical spread of visitors to the different regions	15%	31%	31%	8%	0%	15%
Engage with and involve local communities	8%	38%	23%	0%	8%	23%
Increased the value of visitors to UNESCO sites	0%	23%	46%	8%	0%	23%

Table 4.3: UNESCO Trail Contribution to Strategic Objectives

Objective	Summary of Evidence Provided by Designations	Key Comments
Profile - Raise the profile of Scotland's UNESCO assets locally, nationally and internationally	<ul style="list-style-type: none"> • International prizes – captured imagination • Global imitators & awareness – innovative approach • Scotland as a positive innovator– international awareness • Raised awareness & improved knowledge of lesser-known sites nationally and internationally (through association with VisitScotland & UK National Commission for UNESCO) – inclusive 	<ul style="list-style-type: none"> • “Best demonstrated by the international prizes it has won (see Section 4.6), and the enthusiasm of other countries to replicate it. The strong theme of sustainability a major driver behind this.” • Nationally and locally, it's been a brilliant way of linking the different UNESCO designations, and understanding the aims of UNESCO better”
Celebrate - Provide opportunities to celebrate UNESCO assets via tourism and events	<ul style="list-style-type: none"> • Celebration of shared connections, important & valuable impetus to celebrate (when might have not done so) • First time ever some sites promoted to 'tourists' • Good material for conferences • UNESCO Trail & awards used to 'promote the significance of the region' 	<ul style="list-style-type: none"> • “We use the UNESCO trail as one of our marketing tools when speaking to Tourism providers/ organisations/ tour groups/ student groups about the value of UNESCO.” • “With the general move towards encouraging visitors to slow down and get to know areas in more depth, the UNESCO trail is helpful as a way of signposting other areas.
Collaborate - Encourage collaborative working between designations and the wider tourism sector	<ul style="list-style-type: none"> • First time UNESCO sites have collaborated on a single project • Lasting connections made with other Scotland UNESCO sites, UK National Commission for UNESCO, VisitScotland, Local Authorities and other stakeholders • Promoting the Trail has improved linkages and engagement with similar international designations (e.g. the UNESCO cities music sub-cluster networks of 71 cities) 	<ul style="list-style-type: none"> • “UNESCO Scotland group didn't exist prior to the Trail and since then it has continued to meet, resulting in additional collaborative projects” • This is the largest advantage of the Trail we have seen so far. Internally, we use the Trail to connect and collaborate with other sites in ways we would not have previously.”
Participate - Inspire residents, visitors and new audiences to participate in UNESCO Trail activities	<ul style="list-style-type: none"> • Resources (money and time) may have stifled the potential to grow participation • Available measurement tools to assess participation was also limited 	<ul style="list-style-type: none"> • “We have made sure that local (and digital) communities are aware of the Trail, but because our Site is not yet an organised, coherent tourism destination, it's impossible to measure the Trail's impact.” • “We need to do more ourselves to promote it and to evaluate any impact it has”

Table 4.3: UNESCO Trail Contribution to Strategic Objectives

Objective	Summary of Evidence Provided by Designations	Key Comments
Geographic Spread - Encourage geographical spread of visitors to the different regions	<ul style="list-style-type: none"> Considered to do a good job of showing the breadth of locations Suggestion of a rail or bus travel guide for visitors to Scotland Ultimately designations found this very difficult to measure 	<ul style="list-style-type: none"> 'We are exploring a partnership with Edinburgh airport, and are referencing the trail as a key element of this - so Edinburgh may be an initial destination, but the trail and network of designations may provide a bigger draw, encourage the geographical spread and wider awareness'
Communities - Engaged and involved local communities	<ul style="list-style-type: none"> Useful tool to initiate and engage local communities Especially those that play a significant part in management groups Evidence of sharing and promotion with local residents and also wider stakeholder communities and contacts Resources (financial & time) were considered by some as barriers to engaging communities 	<ul style="list-style-type: none"> 'It definitely helped with engaging communities. It's one of the key things mentioned to community groups that helps elevate why we are a special region' 'It has been good for local businesses, and especially that our Supporters were included in the microsite via a link (with no obligation to join Green Tourism or VS)'
Responsible Tourism - Aid the recovery of tourism by providing a responsible tourism offering for mindful travellers	<ul style="list-style-type: none"> Responsible tourism was identified as a major part of the comms to promote some designations (especially Biospheres) Links with VS and the Trail helped promote responsible tourism Timing (post pandemic) also mentioned as important Difficult to measure and some unsure if the Trail aided 'recovery of tourism' 	<ul style="list-style-type: none"> 'Definitely, especially in the aftermath of the period of antisocial tourist behaviour brought about by the Pandemic. Visit Scotland's campaigns have been a big help' 'Useful timing, coinciding with opening up after the pandemic where attitudes have evolved'
Sustainable Tourism - Apply sustainable tourism policies to contribute to Sustainable Development Goals (SDG)	<ul style="list-style-type: none"> Some agreement with SDG objectives: 'In terms of SDG around environmental impact of tourism, supporting green initiatives etc.' 'Yes - this is at the heart of communications and helps endorse and educate others about the SDGs' Trail would have been enhanced by 'integrated public transport' improvements 	<ul style="list-style-type: none"> 'Helped demonstrate relevance and has influenced us being seen as a strategic player in the region for sustainable tourism both with local tourism businesses and also with the strategic partners'

Partnerships & Legacy

In addition to the evidence shared in Table 4.3, designations also felt the UNESCO Trail delivered important ongoing partnership linkages and legacy benefits and improved relationships and partnership building with Scottish Government; VisitScotland; Historic Environment Scotland; NatureScot; Glasgow University; ¹⁴ other Scotland/ UK & International UNESCO sites. Some also stated it was ‘too hard to say.’

The UNESCO Trail was considered to have legacy benefits by:

- Providing global inspiration to create similar trails worldwide
- Acting as a vehicle to continue to share ‘best practice with other international cities and designations
- Providing general ongoing network effects and an easier route to develop future projects
- The continued use and utilisation of UNESCO Trail education packs and materials for existing education offerings and site tours

Some designations thought the legacy impacts may be limited by resource (time and financial) and stated ‘dedication’ was needed to maintain the ‘impetus’ and ‘keep it fresh’.

4.6 National and International Awards

The specific design and characteristics of the UNESCO Trail has resulted in the following domestic and international awards for excellence in sustainable tourism:

- Wanderlust Sustainability Award (UK) ¹⁵
- Fondazione Santagata Award 2022 for sustainable development projects (Italy) ¹⁶
- Tour Mag Responsible Travel Award "Césars du Voyage Responsable" (France) ¹⁷
- Named in Rough Guides’ 24 best destinations to visit in 2024 (contained in ‘Best destinations for meaningful travel’. ¹⁸



¹⁴ RILA (Refugee Integration through Language & the Arts)

¹⁵ <https://wanderlusttravelawards.com/awards/>

¹⁶ <https://www.fondazioneasantagata.it/en/category/tools/special-projects/fondazione-santagata-award-en/>

¹⁷ <https://www.visitscotland.org/news/2023/unesco-trail-award>

¹⁸ <https://www.visitscotland.org/news/2023/unesco-named-must-visit>

5.0

STAGE 2 – VISITOR INFLUENCE



Stage 2 – Visitor Influence

5.1 Approach

VisitScotland annually surveys a statistically representative number of contacts from our CRM (customer relationship management) database.¹⁹ This provides valuable insight into visitor motivations and awareness of marketing campaigns and promotions. VisitScotland has over 900,000 CRM contacts.

Questions on UNESCO Trail awareness, visitation and its importance to visits were asked in 2024 for international visitors and in 2023 and 2024 for domestic visitors.

Questions included:

- Awareness - have you heard about Scotland's UNESCO Trail?
- Designations visited – which UNESCO sites did you visit?
- Importance - how important was the UNESCO Trail to your visit?

5.2 Comparison Between Years Clarification

Interruptions to data collection methodologies mean comparison between years is only truly permissible for Scotland's domestic market. This is a direct result of Covid-19 international travel restrictions influencing international evaluation data collection methodologies.²⁰

Both years are provided for international visitors as it broadly shows reassuring consistency in awareness, visitation and influence and helps corroborate the robustness of the assessment.

5.3 UNESCO Trail - Awareness

Domestic

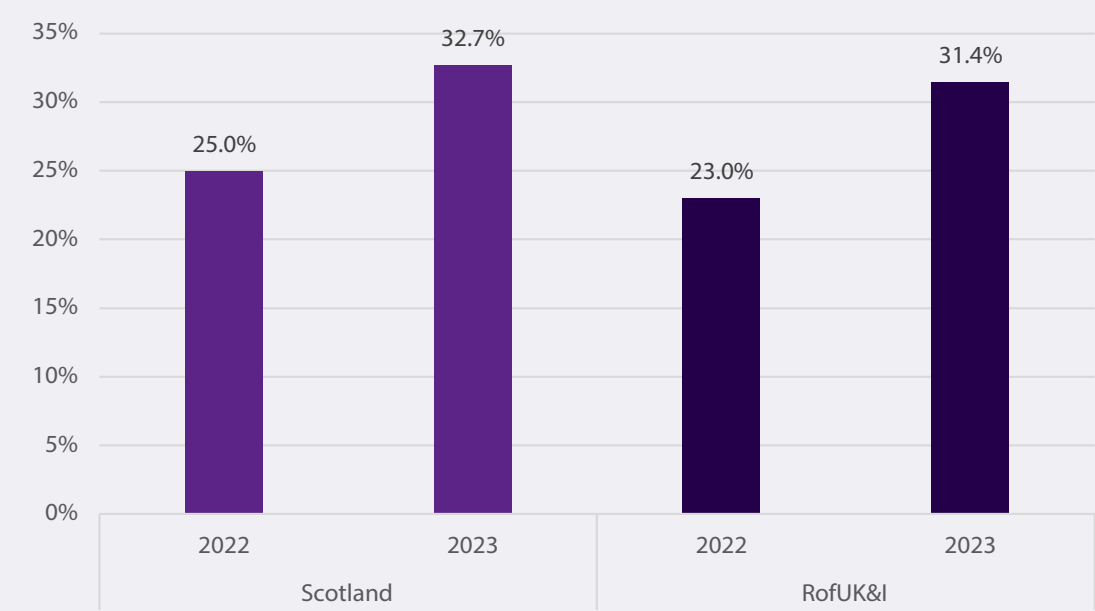
Chart 5.1 shows that in 2022 around a quarter of *domestic* contacts from Scotland and the Rest of UK and Ireland were aware of Scotland's UNESCO Trail. Awareness noticeably increased in 2023 when around a third of domestic contacts from each market stated they were aware of the UNESCO Trail.



¹⁹ Contacts are acquired organically or through paid acquisitions (e.g., social media campaigns) and receive regular VisitScotland E-News and marketing messages

²⁰ Domestic was collected in two separate years (e.g., 2022 in 2023 and 2023 in 2024). International was collected for two separate years at the same time (e.g., 2022 and 2023 data collected in 2024). The years relate to the responses from contacts that were definitely on the VisitScotland database contacts list in each year.

Chart 5.1: Awareness – Domestic Market



International – Short-haul

International yearly comparisons have a slightly different methodology to domestic with 2023 and 2022 information being collected in the same year (2024). In Chart 5.2 (and similarly Chart 5.3) the years in each case relate to responses from VisitScotland contacts that were on the VisitScotland CRM database at that time.

While comparison between years is not as relevant for international, comparisons between countries is permissible and identifies high levels of awareness in Germany, where around a third of VisitScotland’s German market were aware of the UNESCO Trail (Chart 5.2). This falls to one in four in Italy and the Netherlands and around one in five in France and Spain.

International – Long-haul

Long-haul awareness was generally greater than domestic and the key international short-haul markets (Chart 5.3). The US and Canada markets reported notably high levels of awareness of the UNESCO Trail, and awareness in Australia while comparatively below the US and Canada was still consistent with the highest short-haul market (Germany) and Scotland’s domestic markets.

Chart 5.2: Awareness – International Short-Haul Market

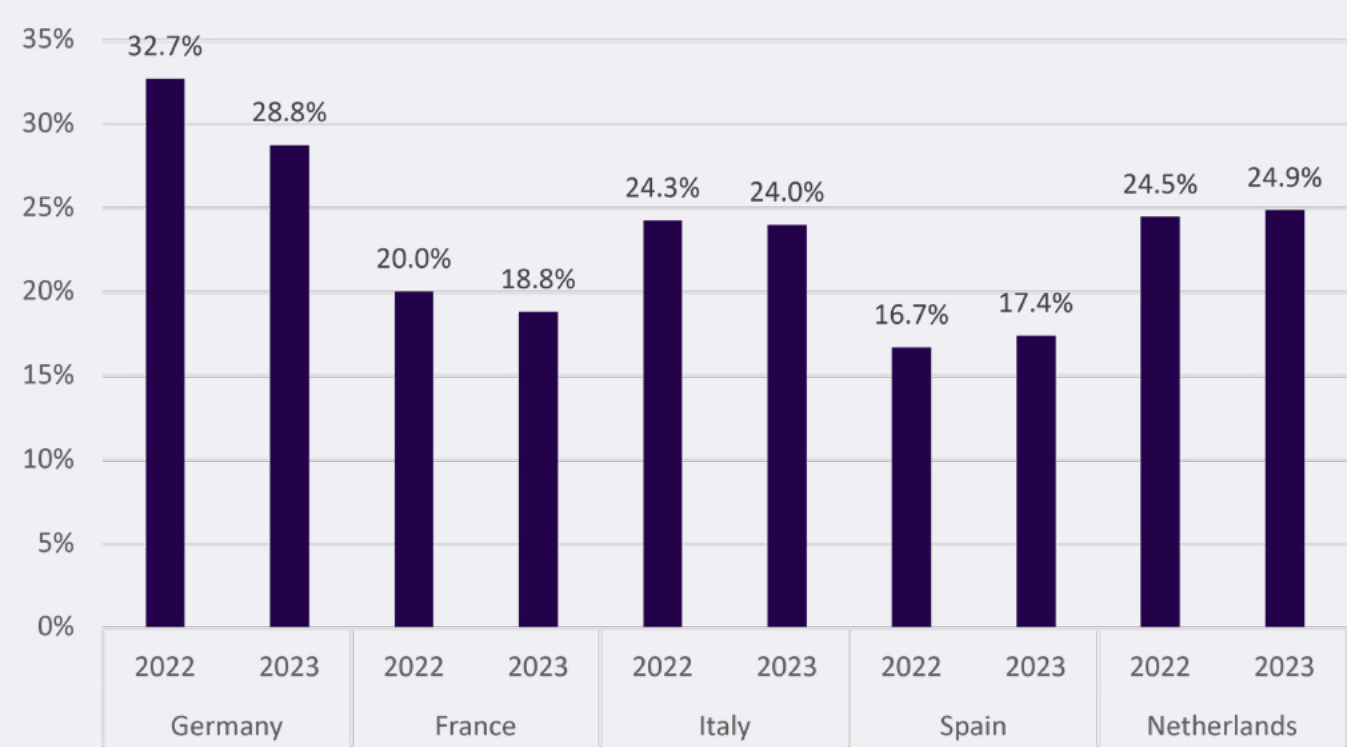
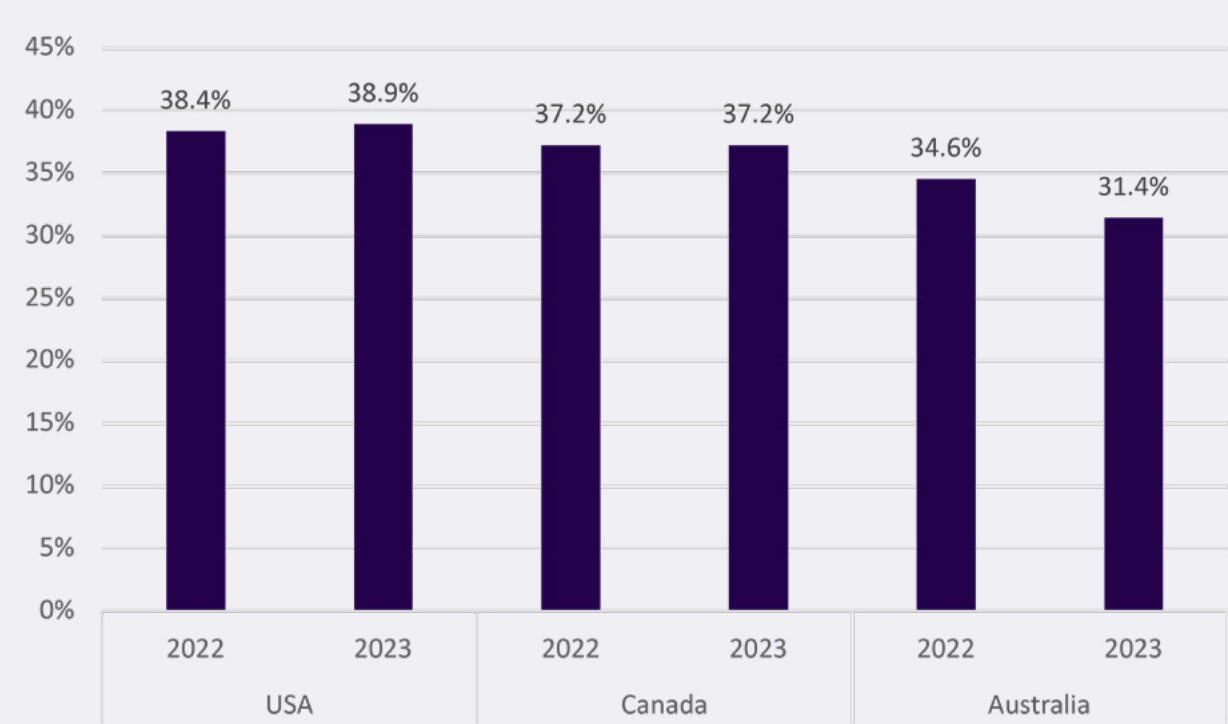


Chart 5.3: Awareness – International Long-Haul Market



5.4 UNESCO Trail - Visits

Visits to UNESCO Sites by Market Relative to Attractions

Table 5.1 shows the proportion of domestic, short-haul and long-haul visitors that visited a UNESCO site (and importantly were aware they are visiting a UNESCO site ²¹) while in Scotland.

Around one in twelve (8%) domestic visitors typically visit a UNESCO site while taking a holiday or short break in Scotland. This increased to around one in six (16%) for short-haul visitors and one in four (28%) for long-haul. ²²

Visiting a UNESCO site is comfortably and consistently the 10th most popular attraction by visitor classification and by market.

Appendix 4 provides additional visitor value information on Scotland's key visitor markets. This can be used as useful reference data alongside Table 5.1 and alongside the key market awareness, visits and influence data in this section.

Table 5.1: Attractions Visited – Market Summary ²³

	Total sample	UK visitors	Europe visitors	Long haul Visitors
A castle or a fort	59%	48%	80%	88%
A museum or art gallery	50%	44%	60%	66%
A historic house, place, stately home	49%	41%	60%	72%
A cathedral, church abbey, place of worship	45%	33%	71%	76%
A country park or garden	42%	38%	52%	51%
A visitor or heritage centre	42%	40%	38%	54%
A nature reserve	32%	28%	52%	35%
An archaeological site	24%	18%	32%	41%
A whisky distillery	21%	13%	38%	42%
A UNESCO site	13%	8%	16%	28%
An aquarium, zoo, wildlife park, safari park	7%	7%	8%	6%
A working farm or croft	7%	5%	8%	17%
A brewery	6%	5%	6%	15%
A gin distillery	5%	4%	8%	8%
Another attraction	13%	14%	8%	12%
Did not visit any attractions	4%	6%	0%	0%
Base	3,011	1,531	625	795

²¹ i.e., Visitors may visit one of Scotland's cities but will be unaware they are UNESCO designated Creative City.

²² $100/8=12.5$; $100/16=6.3$; $100/28=3.6$

²³ Source: VisitScotland Visitor Survey 2023

Visits – Domestic Market

Domestic and international visitors were asked what UNESCO sites they visited. Table 5.2 shows visitation for the majority of domestic designations increased between 2022 and 2023

Most notably there were large increases in visitation to Creative City designations among Scotland residents. Increases in Creative Cities and other designations was less pronounced for the rest of the UK and Ireland market while geographically peripheral designations had minor increases or static visitation levels between 2022 and 2023.

Overall though there was an increase in the proportion of visitors that visited ‘at least one’ designation for the Scotland market (increasing from 59% to 71%) and the Rest of UK and Ireland market (increasing from 34% to 42%).

Table 5.2: UNESCO Designations Visited 2022 and 2023

	Scotland		Rof UK&I	
UNESCO Designation (type)	2022	2023	2022	2023
Galloway & Southern Ayrshire (BR)	5%	9%	3%	4%
Wester Ross (BR)	2%	2%	1%	1%
Dundee UNESCO City of Design (CC)	18%	25%	5%	5%
Edinburgh UNESCO City of Literature (CC)	22%	30%	12%	16%
Glasgow UNESCO City of Music (CC)	17%	23%	6%	11%
Shetland (GG)	2%	4%	2%	1%
North West Highlands (GG)	5%	8%	5%	5%
The Forth Bridge (WHS)	26%	31%	14%	16%
Antonine Wall (WHS)	9%	9%	2%	3%
Heart of Neolithic Orkney (WHS)	6%	9%	4%	5%
New Lanark (WHS)	19%	20%	4%	4%
Old and New Towns of Edinburgh (WHS)	31%	40%	14%	18%
St Kilda (WHS)	2%	2%	1%	1%
None of the above	41%	29%	66%	58%
Visited at least one	59%	71%	34%	42%
TOTAL	1,054	260	2,133	773

Visits – International Markets

International responses from 2022 and 2023 on actual visits have been combined to help improve the statistical robustness of some of the less visited designations (Table 5.3).

Responses on visitation levels were significantly higher for short-haul and long-haul. This is also consistent with VisitScotland visitor research (Table 5.1). There was particularly high visitation to Creative Cities and the Old and New Towns of Edinburgh.

Table 5.3: UNESCO Designations Short-haul & Long-haul

	Short-haul				Long-haul			
UNESCO Designation (type)	France	Germany	Italy	Spain	Netherlands	Canada	Germany	Germany
Galloway & Southern Ayrshire (BR)	2%	8%	4%	8%	3%	1%	1%	2%
Wester Ross (BR)	3%	4%	1%	3%	1%	0%	1%	1%
Dundee UNESCO City of Design (CC)	12%	9%	6%	24%	6%	6%	10%	13%
Edinburgh UNESCO City of Literature (CC)	63%	48%	57%	80%	45%	38%	39%	35%
Glasgow UNESCO City of Music (CC)	35%	25%	19%	44%	21%	21%	29%	20%
Shetland (GG)	3%	2%	3%	5%	2%	4%	4%	9%
North West Highlands (GG)	17%	15%	27%	20%	20%	7%	8%	11%
The Forth Bridge (WHS)	14%	37%	18%	31%	20%	23%	33%	37%
Antonine Wall (WHS)	5%	9%	10%	11%	12%	6%	5%	10%
Heart of Neolithic Orkney (WHS)	6%	10%	9%	6%	9%	8%	9%	13%
New Lanark (WHS)	5%	3%	3%	5%	4%	2%	4%	11%
Old and New Towns of Edinburgh (WHS)	62%	59%	52%	60%	41%	57%	52%	60%
St Kilda (WHS)	2%	2%	3%	2%	1%	3%	2%	1%
None of the above	19%	10%	17%	8%	26%	23%	22%	20%
Visited at least one	81%	90%	83%	92%	74%	77%	78%	80%
Total	289	362	171	295	328	416	313	166

5.5 UNESCO Trail – Importance to Visit

Combined ‘Very’ Important & ‘Quite’ Important to Visit

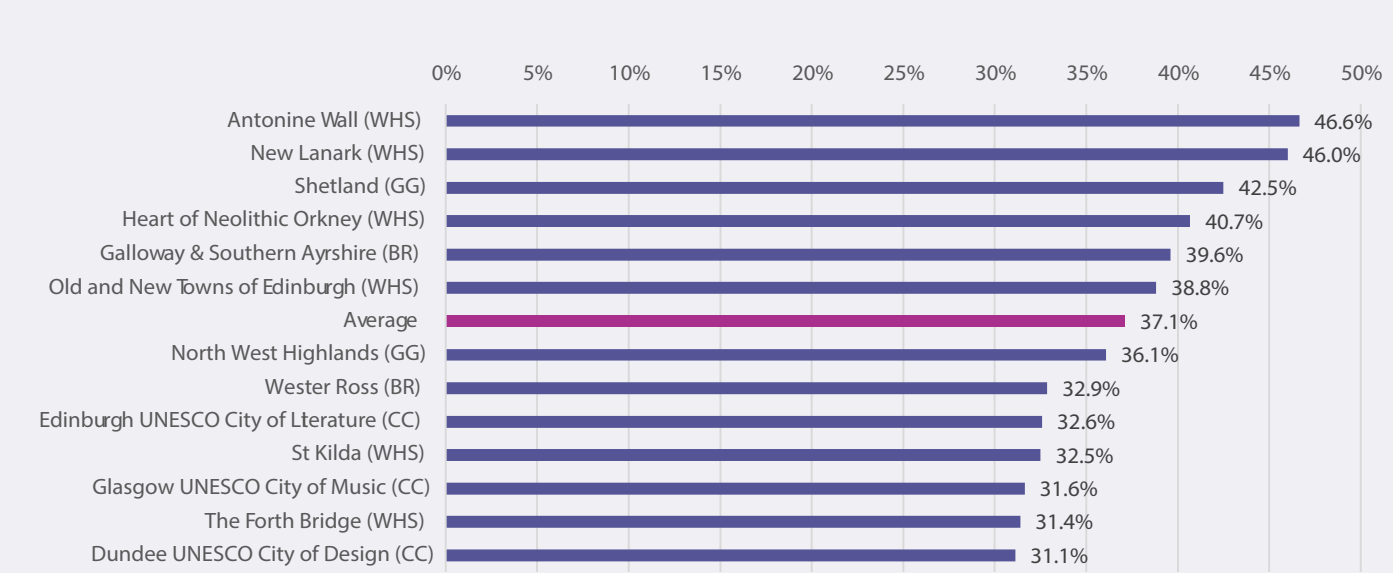
Awareness of the UNESCO Trail and reported visits to UNESCO designations is clearly useful insight. The significant factor however is how important the UNESCO Trail was in driving visits. Chart 5.4 combines the responses of those that stated the UNESCO Trail was either ‘very’ important or ‘quite’ important to their visit.

Between approximately 31% and 46% of visitors stated the UNESCO Trail was an important factor in their decision to visit a UNESCO designation, which is significantly high and considered to be a key indication of the success of the UNESCO Trail in driving visits to Scotland and Scotland’s UNESCO sites.

The UNESCO Trail was particularly important for visitors to the Antonine Wall, New Lanark and also for some of the more geographically peripheral and perhaps more specific purpose driven trips to Shetland and Orkney. The UNESCO Trail was also of above average importance to the Galloway and Southern Ayrshire Biosphere and Old and New Towns of Edinburgh. Four of the six UNESCO sites for which the UNESCO Trail was of above average importance were World Heritage Sites.

North West Highland and Wester Ross were close to the average. The UNESCO Trail was however reported to be of slightly less relative importance for Creative Cities and the strictly controlled visitation area of St Kilda.

Chart 5.4: Combined ‘Very’ Important & ‘quite’ important to Visit



Breakdown of Importance to Visit

Chart 5.5 provides a more detailed breakdown of how important the UNESCO Trail was to a visit to each designation. It compliments Chart 5.1 by providing a wider range of responses from very important, quite important, neither important/ nor unimportant, quite unimportant and very unimportant.

The UNESCO Trail was reported to be a 'very important' factor for over 20% of survey respondee visitors to Shetland Global Geopark, New Lanark and the Antonine Wall.

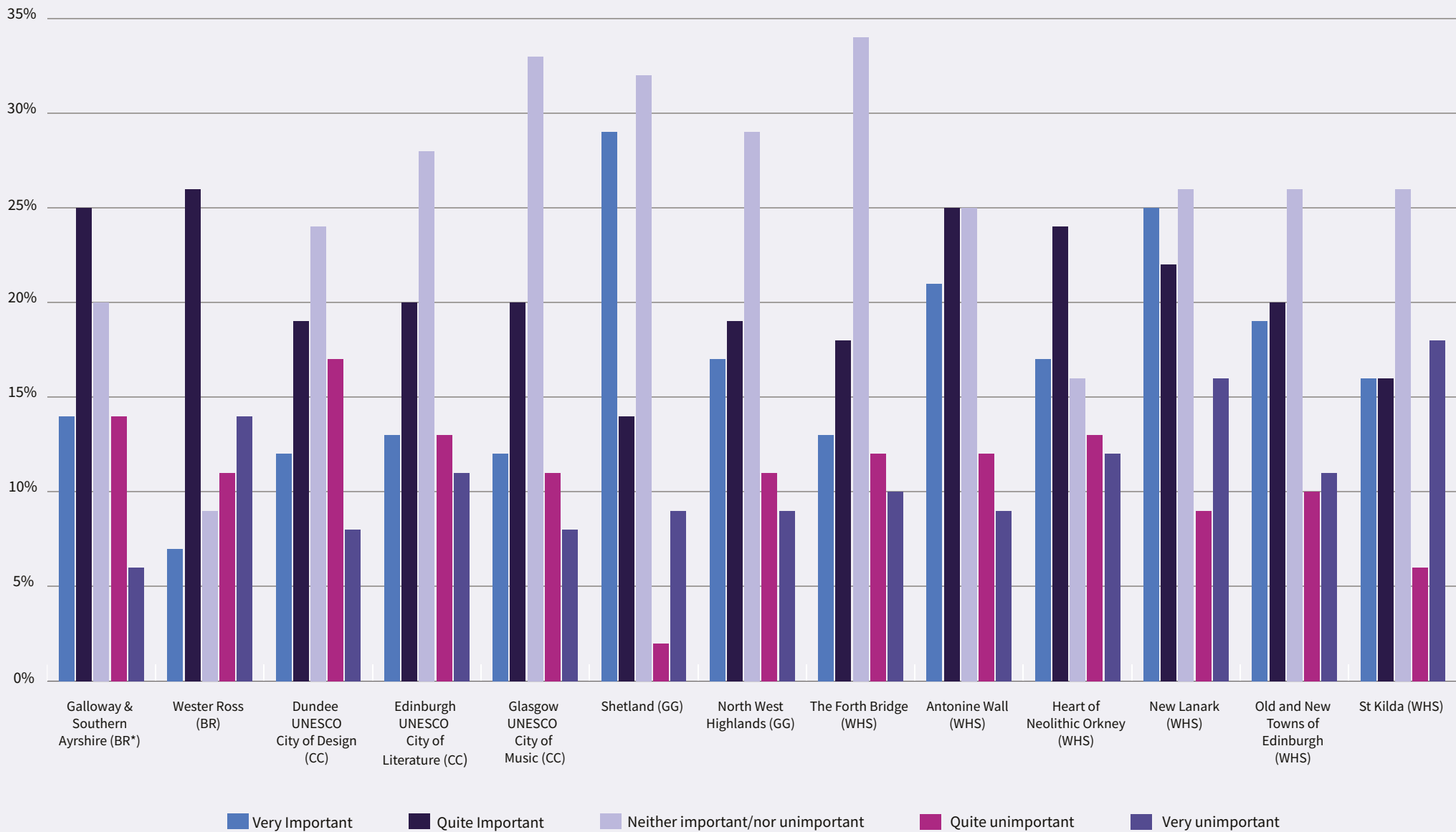
The highest proportion of 'very unimportant' responses was reported by visitors to St Kilda which is the only strictly controlled visitor area.

A notably high proportion of visitors to Scotland's creative cities stated the UNESCO Trail was 'neither important/ unimportant' to their visit. This is perhaps understandable given the wide range of other factors that influence visitor intentions to cities. A similarly high proportion of visitors the Forth Bridge, and Shetland and North West Highland Geoparks also stated the UNESCO Trail was 'neither important/ unimportant' to their visit.



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Chart 5.5: Influence of UNESCO Trail – Importance to Visit



Note: Does not include % that 'did not know' or only found out via survey question

6.0

STAGE 3 - STRATEGIC CONTRIBUTION



Stage 3 - Strategic Contribution

6.1 Aligning Impacts with Strategy Objectives

This section brings together the designation and visitor evidence collected in Stages 1 and 2 to demonstrate how the UNESCO Trail has contributed to key global and national policy objectives, including:

- United Nations Sustainable Development Goals (SDGs)
- Scotland's National Strategy for Economic Transformation (NSET)
- Scotland Outlook 2030 – Scotland's National Tourism Strategy

A brief introduction to each strategy and its objectives are provided below.

Tables 6.1 to 6.3 align the available impact evidence with specific objectives to show where the UNESCO Trail has delivered its greatest contribution.

6.2 United Nations Sustainable Development Goals (SDGs)

In 2015 all UN Member States adopted the 2030 Agenda for Sustainable Development which provides a shared blueprint for peace and prosperity for people and the planet

Chart 6.1 shows the 17 Sustainable Development Goals (SDGs). The SDGs recognise that ending poverty and other deprivations must go hand-in-hand with strategies that improve:

- Health and education
- Reduce inequality, and
- Stimulate economic growth

All while tackling:

- Climate change and
- Working to preserve our oceans and forests.

Understandably Scotland's UNESCO Trail has had a negligible direct contribution to the SDGs related to reducing poverty, hunger, promoting gender equality and certain ecological goals. These were not part of the UNESCO Trails strategic objectives.

The most relevant SDGs for the UNESCO Trail are:

- **Goal 8** – Decent Work and Economic Growth
- **Goal 11** – Sustainable Cities and Communities
- **Goal 17** – Partnerships for the Goals

Chart 6.1 UN SGD's



Table 6.1 UNESCO Trail Strategic Contributions to UN Sustainable Development Goals

SDG	UNESCO Trail Strategic Contribution
<p>Decent Work & Economic Growth</p> 	<ul style="list-style-type: none"> On average 37% of visitors that were aware of the UNESCO Trail and visited, believed the UNESCO Trail had either a ‘very important’ or ‘quite importance’ influence on their visit Importance ranged from 47% (Antonine Wall) to 31% (Dundee UNESCO City of Design) Around a quarter (23%) of designations believed the UNESCO Trail had helped increase the value of visitors to UNESCO sites (e.g., stay longer and spend more locally, improving, in turn, the quality of life of those communities) 50% believed the UNESCO Trail inspired residents, visitors and new audiences to visit UNESCO designations
<p>Sustainable Cities & Communities</p> 	<ul style="list-style-type: none"> 67% of designations agreed the UNESCO Trail applied sustainable tourism policies to contribute to SDGs 54% stated it also aided in the recovery of tourism by providing a responsible tourism offering for mindful travellers Almost half (48%) of designations believed the Scotland’s UNESCO Trail engaged and involved local communities The UNESCO Trail also received a prestigious international award for responsible tourism (‘Tourmag - Césars du Voyage Responsible’ Award, Marseille March 2023) Other awards include: the Santagata Foundation Award and the Wanderlust Sustainability Award (both Nov. 2022) These awards reinforce Scotland’s position as a leading international sustainable travel destination Also named in Rough Guides’ 24 best destinations to visit in 2024 (contained in ‘Best destinations for meaningful travel’)
<p>Partnerships for the Goals</p> 	<ul style="list-style-type: none"> All designations (100%) stated the UNESCO Trail encouraged collaborative working between designations and the wider tourism sector 92% of designations thought Scotland’s UNESCO Trail successfully promoted UNESCO values

Chart 6.2 NSET Priority Areas



6.3 Scotland's National Strategy for Economic Transformation (NSET)

Scotland's economic strategy (NSET) sets out a framework for a competitive and fairer Scotland.

The strategy provides a broad approach to:

- Boosting competitiveness and
- Addressing inequality.

NSET has six broad priority areas where actions and investment should be targeted:

1. Entrepreneurial people & culture
2. New market opportunities
3. Productive businesses and regions
4. Skilled workforce
5. A fairer and more equal society
6. A culture of delivery

The UNESCO Trail has contributed to a greater or lesser extent to each of these six priority areas. (Table 6.2)

6.4 Scotland Outlook 2030 – Scotland's National Tourism Strategy

Scotland's national tourism strategy has the following themes:

- Memorable experiences
- Thriving places
- Passionate people
- Diverse businesses (in this case designations)
- Responsible tourism








Table 6.3 demonstrates how the UNESCO Trail has contributed to each of these themes.

Table 6.2 UNESCO Trail Strategic Contributions to NSET

NSET	UNESCO Trail Strategic Contribution
New Market Opportunity	<ul style="list-style-type: none"> • Showcases Scottish UNESCO assets and locations to UK and international markets • Promoted to all domestic and international CRM contacts with paid campaigns in France and Germany • Generates additional visitor revenue to Scotland equivalent to raising the value of Scottish exports
Productive Business & Region	<ul style="list-style-type: none"> • Productive connections established - first time UNESCO designation have collaborated on a single project • Valuable and enduring regional, national and international linkages with tourism and economic development stakeholders • Almost half of designations (42%) believed the UNESCO Trail had encouraged geographical spread of visitors to the different regions • Considered a useful tool to initiate and engage local communities
Entrepreneurial People & Culture	<ul style="list-style-type: none"> • 77% of designations believed the UNESCO Trail provided opportunities to celebrate UNESCO assets via tourism and events • Facilitates networking and commerce with high value UK and international travel trade to grow business potential • Provides access to valuable VisitScotland and economic and tourism development networks
A Fairer More Equal Society	<ul style="list-style-type: none"> • Promoted all UNESCO designations and locations equally and encouraged visitation throughout seasons • UNESCO Trail also highlighted and promoted UNESCO values and objectives • 85% of designations stated the UNESCO Trail has raised the profile of Scotland's UNESCO assets locally, nationally and internationally
Skilled Workforce	<ul style="list-style-type: none"> • Scotland's UNESCO designation contacts exposed to marketing and promotion tactics • First time ever some sites promoted to 'tourists'
A Culture of Delivery	<ul style="list-style-type: none"> • Delivered in accordance with original objectives • Achieved prestigious international awards and inspired new UNESCO Trails throughout the world • UNESCO Trail site content refreshed on visitscotland.com, including addition of new designations (Perth and The Flow Country and Arran Global Geopark), and business toolkit updated

Table 6.3 UNESCO Trail Strategic Contribution to SO2030

SO2030	UNESCO Trail Strategic Contribution
Memorable Experiences 	<ul style="list-style-type: none"> • 77% of designations stated the UNESCO provided opportunities to celebrate UNESCO assets via tourism and events • 85% of designations stated the UNESCO Trail has raised the profile of Scotland's UNESCO assets locally, nationally and internationally • UNESCO Trail also highlighted and promoted UNESCO values and objectives
Thriving Places 	<ul style="list-style-type: none"> • Promoted all UNESCO designations and locations equally and encouraged visitation throughout seasons • Showcases Scottish UNESCO assets and locations to UK and international visitors • Almost half (42%) believed the UNESCO Trail had encouraged geographical spread of visitors to the different regions • First time ever some sites promoted to 'tourists'
Passionate People 	<ul style="list-style-type: none"> • Provides access to valuable VisitScotland and economic and tourism development networks • Valuable and enduring regional, national and international linkages with tourism and economic development stakeholders • Useful tool to initiate and engage local communities
Diverse Businesses 	<ul style="list-style-type: none"> • Productive connections established - first time UNESCO designations collaborated on a single project • Generates additional visitor revenue to Scotland equivalent to raising the value of Scottish exports • Scotland's UNESCO designation contacts exposed to marketing and promotion tactics
Responsible Tourism 	<ul style="list-style-type: none"> • Delivered in accordance with original objectives • Achieved prestigious international awards and inspired new UNESCO Trails throughout the world • UNESCO Trail site content refreshed on visitscotland.com, including addition of new designations (Perth and The Flow Country), and business toolkit updated

APPENDIXES 1-4



Appendix 1 – Designation Questionnaire

Questions:

1. Designation name
2. Primary contact name

To what extent do you agree with the following statements?

The UNESCO Trail has:

QUESTIONS – UNESCO TRAIL OBJECTIVES

3. raised the **profile** of Scotland's UNESCO assets locally, nationally and internationally
4. provided **opportunities** to celebrate UNESCO assets via tourism and events
5. inspired residents, visitors and new audiences to **participate** in UNESCO Trail activities
6. encouraged **collaborative** working between designations and the wider tourism sector
7. increased the **value** of visitors to UNESCO sites (e.g., stay longer and spend more locally, improving, in turn, the quality of life of those communities)
8. encourage **geographical spread** of visitors to the different regions
9. helped engage with and involve local **communities**
10. **promote** the UNESCO values
11. helped apply **sustainable tourism** policies to contribute to Sustainable Development Goals
12. aided in the recovery of tourism by providing a **responsible tourism** offering for mindful travellers

Answers to all above to be selected from:

Strongly agree; Somewhat agree; Neither agree or disagree; Somewhat disagree; Strongly disagree; Don't know

Additional comment box for all: Can you please provide an explanation for your answer and any available evidence or examples?

QUESTIONS –OVERALL IMPACT & LEGACY

Open text box

13. Overall, how has the UNESCO Trail added value to your designation?
14. In what way has the UNESCO Trail helped build stronger relationships and partnerships with government, business, civil society and citizens?
15. Will being part of the UNESCO Trail provide any legacy benefits (e.g., materials; skills; connections)?

Request for additional information

Can you provide any further information or data that can help assess the impact of Scotland's UNESCO Trail? Thank you for your contribution, it is greatly appreciated.

Appendix 2 – Questions to VisitScotland CRM contacts

AWARENESS

Q1: Thinking now about any other advertising and publicity you might have seen for Scotland in the last two years, can we check, have you heard about Scotland's UNESCO Trail?

- Yes - definitely
- Yes - possibly
- No
- Don't know/can't remember

DESIGNATIONS VISITED

Q2. Did you visit any of these Scotland UNESCO sites during your most recent trip in Scotland?

- Biosphere Reserve – Galloway & Southern Ayrshire
- Biosphere Reserve – Wester Ross
- Creative Cities – Dundee UNESCO City of Design
- Creative Cities – Edinburgh UNESCO City of Literature
- Creative Cities – Glasgow UNESCO City of Music
- Global Geoparks – Shetland
- Global Geoparks – North West Highlands

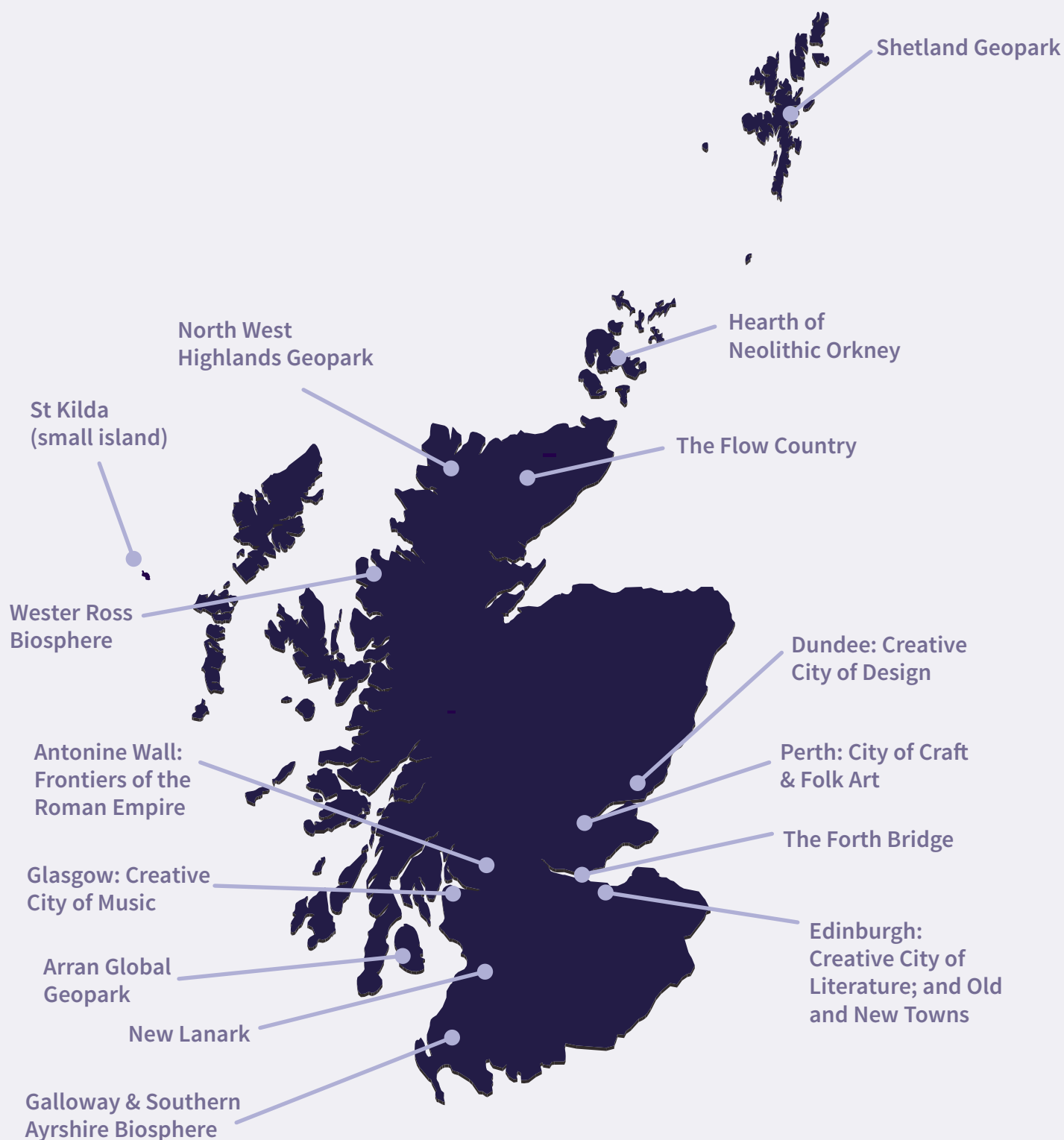
- World Heritage Site – The Forth Bridge
- World Heritage Site – Frontiers of the Roman Empire: Antonine Wall
- World Heritage Site – Heart of Neolithic Orkney
- World Heritage Site – New Lanark
- World Heritage Site – Old and New Towns of Edinburgh
- World Heritage Site – St Kilda
- None of the above

IMPORTANCE

Q4. How important was the UNESCO Trail to your visit?

- Very important
- Quite important
- Neither important / nor unimportant
- Quite unimportant
- Very unimportant
- Unsure/Don't know
- I learned the UNESCO status of the site(s) from my visit(s)

Appendix 3 – Scotland's UNESCO Trail Map



Please note the locations above are provided for illustrative purposes. Please see [Scotland's UNESCO Trail website](#), containing links to individual designations or the [UNESCO Trail Case Study](#) for more precise locations (especially those with greater land masses).

Appendix 4 – Scotland's Top Ten Visitor Markets

Scotland's top ten markets in 2023 (by visit)

Market	Total visits	Total nights	Total spend
Great Britain	12,600,000	34,600,000	£3,200 million
United States	794,000	6,920,000	£1,236 million
Germany	343,000	2,618,000	£247 million
France	335,000	2,551,000	£277 million
Netherlands	280,000	1,608,000	£165 million
Spain	201,000	1,442,000	£108 million
Ireland	200,000	686,000	£84 million
Australia	189,000	2,558,000	£221 million
Canada	175,000	1,921,000	£180 million
Italy	119,000	846,000	£59 million

Source: Great Britain Tourism Survey 2023 (numbers have been rounded) *
International Passenger Survey 2023 (numbers have been rounded).