WISH YOU WERE HERE

THE SCOTTISH LGBT TRAVEL REPORT

Visit Scotland™

EQUALITYNETWORK
LGBTI Equality and Human Rights in Scotland

Equality Network is Scotland's national lesbian, gay, bisexual, transgender and intersex (LGBTI) equality and human rights charity.
www.equality-network.org

Visit Scotland is Scotland's national tourism organisation, providing information on events, accommodation, and what to do in Scotland.
www.visitscotland.com

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Scott Cuthbertson, Equality Network
Lisa Gallacher, Visit Scotland

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INTRODUCTION

SCOTLAND is recognised internationally as a country with a long and proud history, a country with stunning built and natural heritage, and a country with a reputation for friendliness and a warm welcome, but there are other aspects to Scotland which receive far less international attention and for which it should be no less proud.

From the decriminalisation of homosexuality in 1980, to the first same-sex marriages in 2014, Scotland has been on a journey towards full legal and social equality for lesbian, gay, bisexual and transgender (LGBT) people. While there is little doubt that Scotland has made significant progress on LGBT equality and human rights, and that Scotland is one of the world's top travel destinations, this has not translated into Scotland being widely recognised as one of the world's top LGBT friendly travel destinations.

Scotland has an opportunity to sell itself to LGBT people around the world as a modern, forward-thinking country which stands up for equality and can provide for the needs and wants of LGBT tourists.

Tourism is one of Scotland's most important industries, worth an estimated £4.3bn to the Scottish economy each year, while the global LGBT tourism market is worth an estimated £110bn a year.

By doing more to attract and welcome LGBT tourists, we will not only enhance our international reputation, but we will also bring clear social and economic benefits to all of Scotland. Like Scotland's equality journey, a Scotland recognised as a world class LGBT travel destination can be achieved with effort and will.

Scott Cuthbertson
Equality Network

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METHODOLOGY

WISH YOU WERE HERE, the Scottish LGBT travel report, highlights key research findings relating to LGBT travel and perceptions of Scotland as an LGBT friendly destination. It represents the first significant research into LGBT travel in Scotland and was carried out in partnership between the Equality Network, VisitScotland and the Scottish Government.

The survey questions were devised by the Equality Network and Visit Scotland with input from the Scottish Government, it was a self-selecting, web based survey carried out between Monday 17th February and Friday 28th March 2014. The survey received 1365 total responses of which 930 were criteria fulfilled. Being lesbian, gay, bisexual or transgender (LGBT) and being over 16 years old were the only criteria.

The survey was distributed via the Equality Network mailing list and social media channels in Scotland and was also distributed by similar LGBT equality organisations in core markets such as United States, Canada, Australia, New Zealand, Germany, France, Spain, Italy and the Netherlands.

INTERSEX EQUALITY

The Equality Network explicitly included intersex equality and human rights in our charitable aims and work in July 2014. This report is based on a consultation that took place before then and as such it only focuses on those issues faced by LGBT people. For more information on our work for intersex equality visit:

www.equality-network.org/intersex

DEMOGRAPHICS

LOCATION: **68%** of survey participants currently live in Scotland, with **19%** living in the rest of the UK and **13%** from the rest of the world. There were responses from participants in 23 countries.

SEXUAL ORIENTATION: **41%** of respondents were gay men, **30%** were lesbian women, **17%** were bisexual, **7%** were heterosexual/straight, **5%** defined their sexual orientation in other terms.

TRANSGENDER IDENTITY: **8%** of respondents have identified as transgender.

GENDER IDENTITY: **47%** of respondents identified as men, **48%** identified as women, and **5%** defined their gender identity in other terms (including those with a non-binary gender).

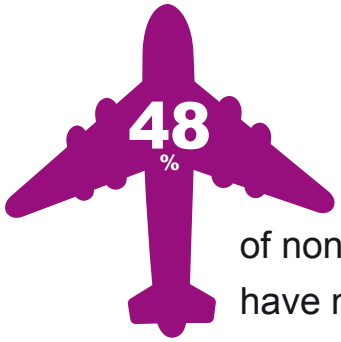
AGE: **19%** of respondents were aged between 16 and 25, **31%** were between 25 and 34, **20%** were between 35 and 44, **19%** were between 45 and 54, and **12%** were over 55.

EMPLOYMENT STATUS: **70%** of respondents were in full time employment, with **10%** working part time. **15%** were full time students and **4%** were unemployed.

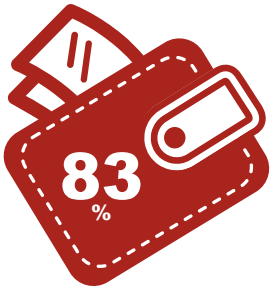
TRAVEL COMPANIONS: Respondents have travelled with their friends (**84%**), partner (**75%)** or family members (**69%**). **32%** have travelled with colleagues and **24%** with children. **70%** said they had travelled on their own.

AT A GLANCE – KEY FINDINGS

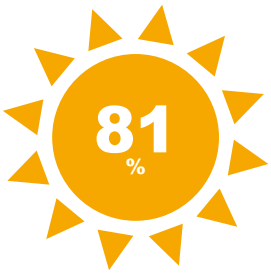
consider Scotland an LGBT friendly destination.



of non-UK travellers who have never been to Scotland, would like to come.



said safety was an important factor in their choice of destination.



said the local legal situation for LGBT people was an important factor in their choice of destination.

said an LGBT friendly reputation was an important factor in their choice of destination.

of travellers from outwith Scotland said they did not know whether Scotland is LGBT friendly.

of rest of UK travellers and 70% of rest of world travellers (who would get married abroad) would consider a same-sex marriage in Scotland.

of LGBT travellers sought out LGBT specific information for their travel destination.

said Scotland comes to mind first when thinking about LGBT friendly destinations around the world.

SECTION 1

LGBT TRAVEL IN SCOTLAND

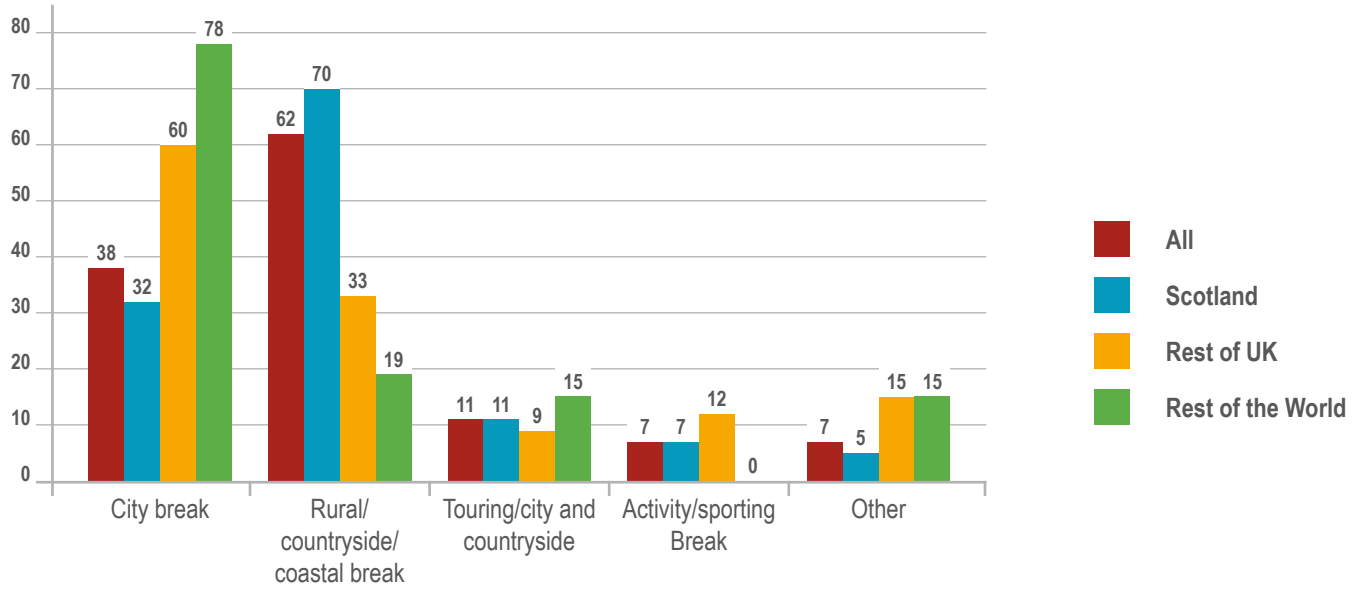
Image © VisitScotland / ScottishViewpoint.

There are many reasons to travel to, or in, Scotland and those reasons can be different for travellers from Scotland and those coming from the rest of the UK or abroad.

Among those LGBT people who had visited Scotland within the past year, the most common type of holiday or short break was a rural/countryside/coastal break (**62%**); this type of trip to Scotland was significantly more popular with Scottish travellers (**70%**) than those from the rest of the UK (**33%**) and the rest of the world (**19%**). City breaks (**38%**) were the second most common type of trip overall but proved far more popular among visitors from the rest of the world (**78%**) and rest of UK travellers (**60%**) than Scottish tourists (**32%**).

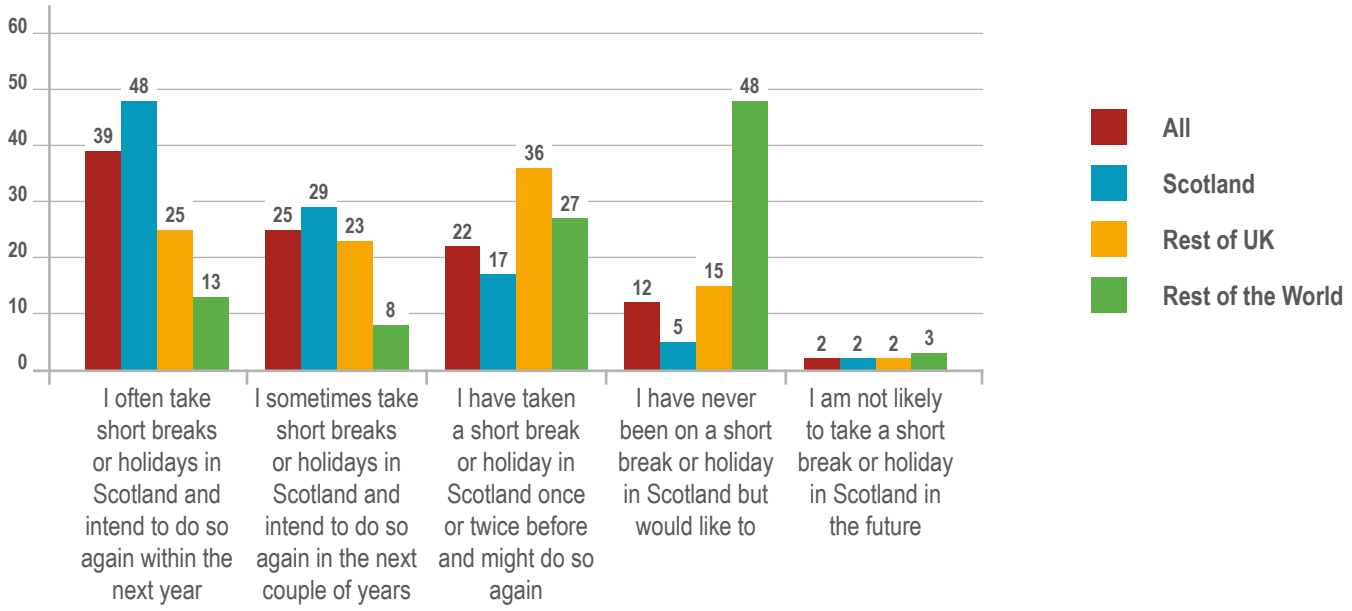
Over one in ten travellers enjoyed a touring holiday (**11%**) while more than one in twenty had an activity break (**7%**). Attending a festival or event and taking part in Hogmanay celebrations were write in answers included as 'Other' responses (**7%**).

Figure 1 How would you best describe the type of holiday or short break you took in Scotland within the past year?



The survey reveals that Scotland is a desirable destination for LGBT travellers; **64%** were regular or occasional visitors to Scotland while an impressive **48%** of those respondents from outside the UK who said they have never been on a short break or holiday in Scotland, would like to. Only **2%** of respondents said they were unlikely to take a holiday or short break in Scotland in the future.

Figure 2 Which one of these statements do you most agree with?



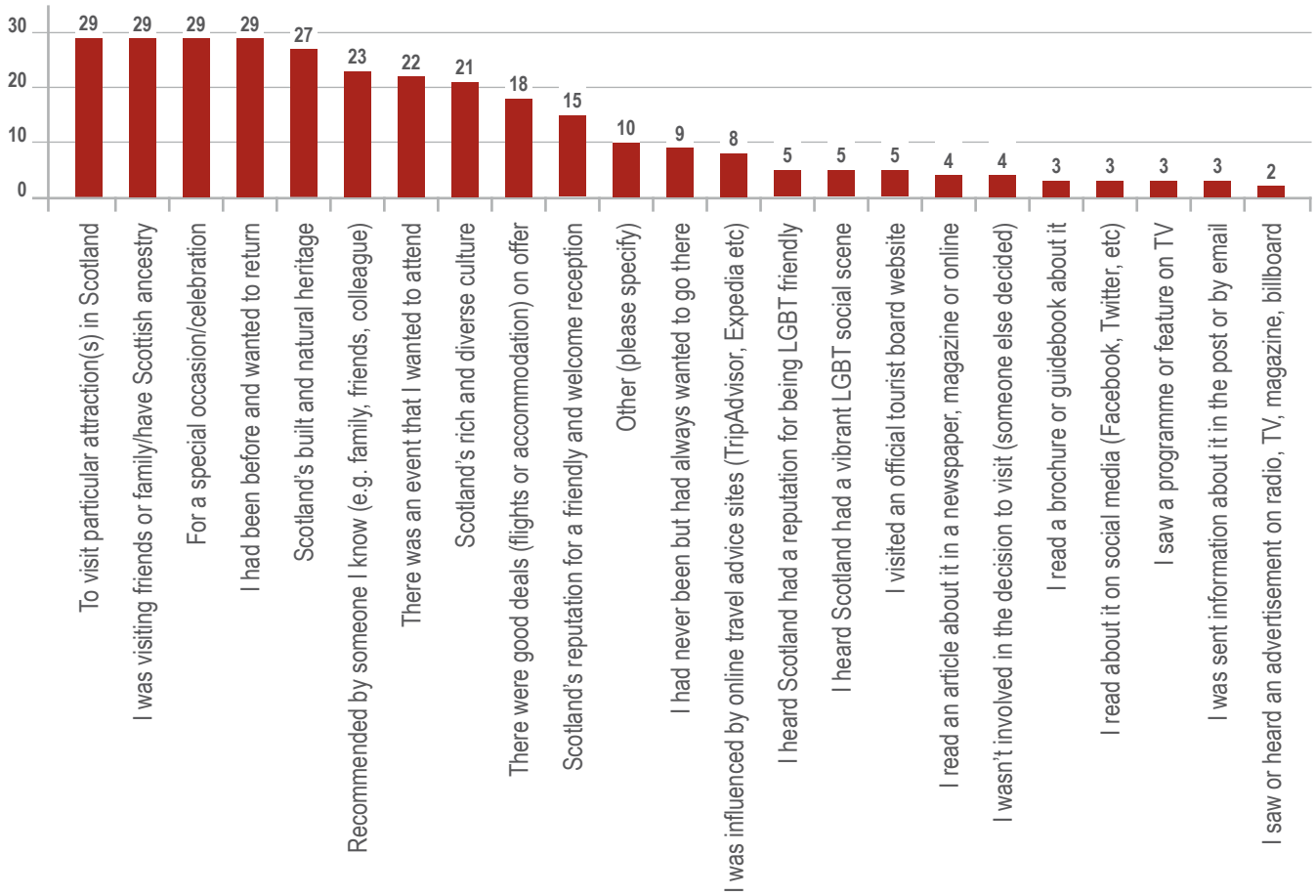
When compared to Visit Scotland data[1], our research shows that many of the factors influencing the decision to holiday in Scotland are similar for LGBT visitors and non-LGBT visitors alike. Making a repeat trip (**29%**), visiting particular attractions (**29%**), visiting friends and family/Scottish ancestry (**29%**), and special occasions (**29%**) were cited by respondents as the largest influencing factors. Scotland's built and natural heritage, which is one of the biggest influencing factors according to VisitScotland research, followed closely behind (**27%**).

5% of participants said they visited because they heard Scotland had a reputation as an LGBT friendly country. While this figure is not insignificant, it suggests that Scotland does not do enough to market itself as an LGBT friendly destination because **73%** of respondents also said that having an LGBT friendly reputation was a 'very important' or 'important' factor in deciding whether to visit a country.

LGBT travellers from the rest of the UK (**52%**) and the rest of the world (**59%**) cited visiting family or friends/ having Scottish ancestry as the largest influencing factors. Other influencing factors mentioned by participants included being able to travel with pets, cost and taking romantic breaks with partners.

[1] http://www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx

Figure 3 Thinking about when you made the decision to take your recent holiday or short break in Scotland, what were the things that influenced your decision? Please choose as many as apply.



SECTION 2

LGBT TRAVELLERS' PERCEPTIONS OF SCOTLAND

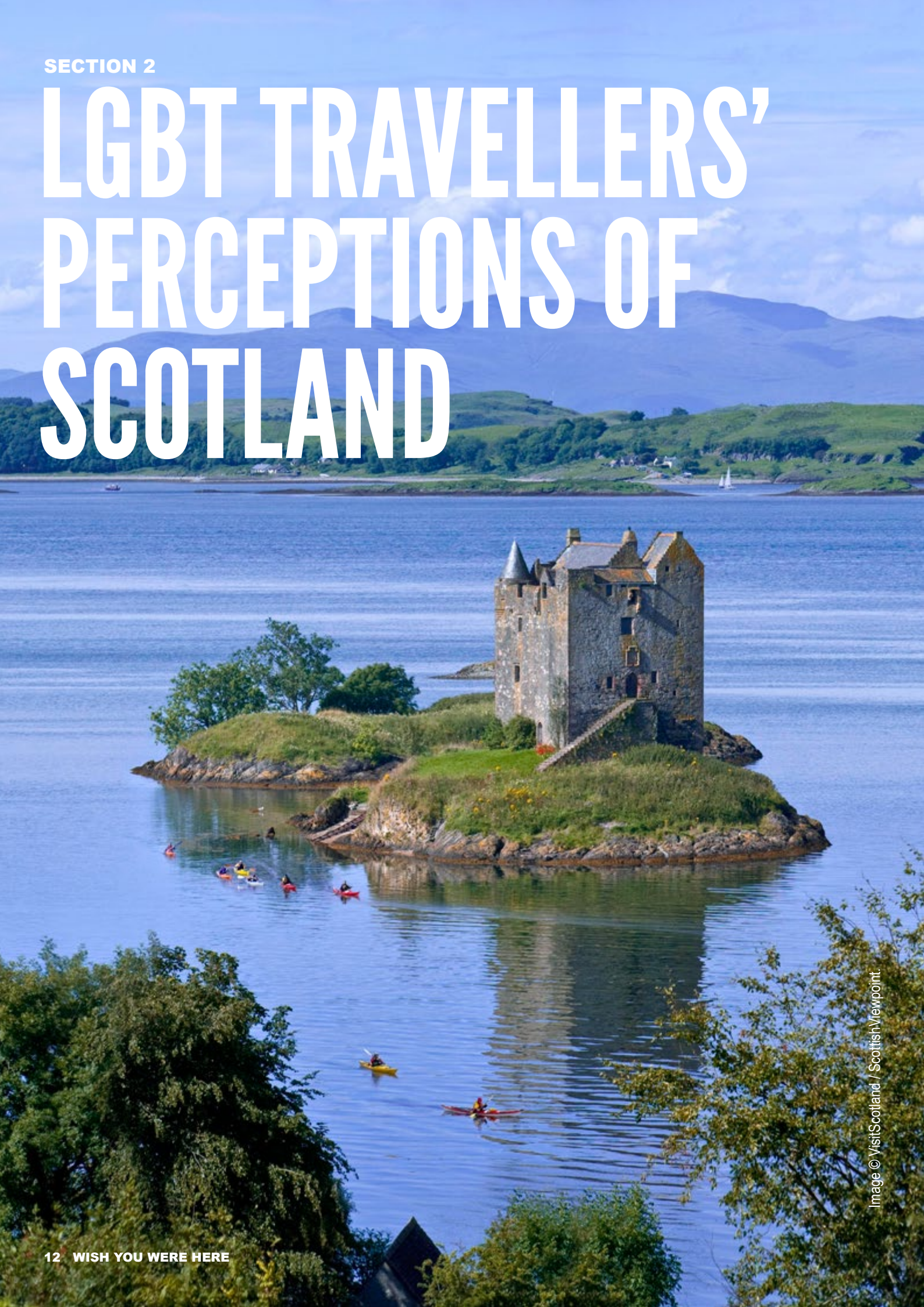
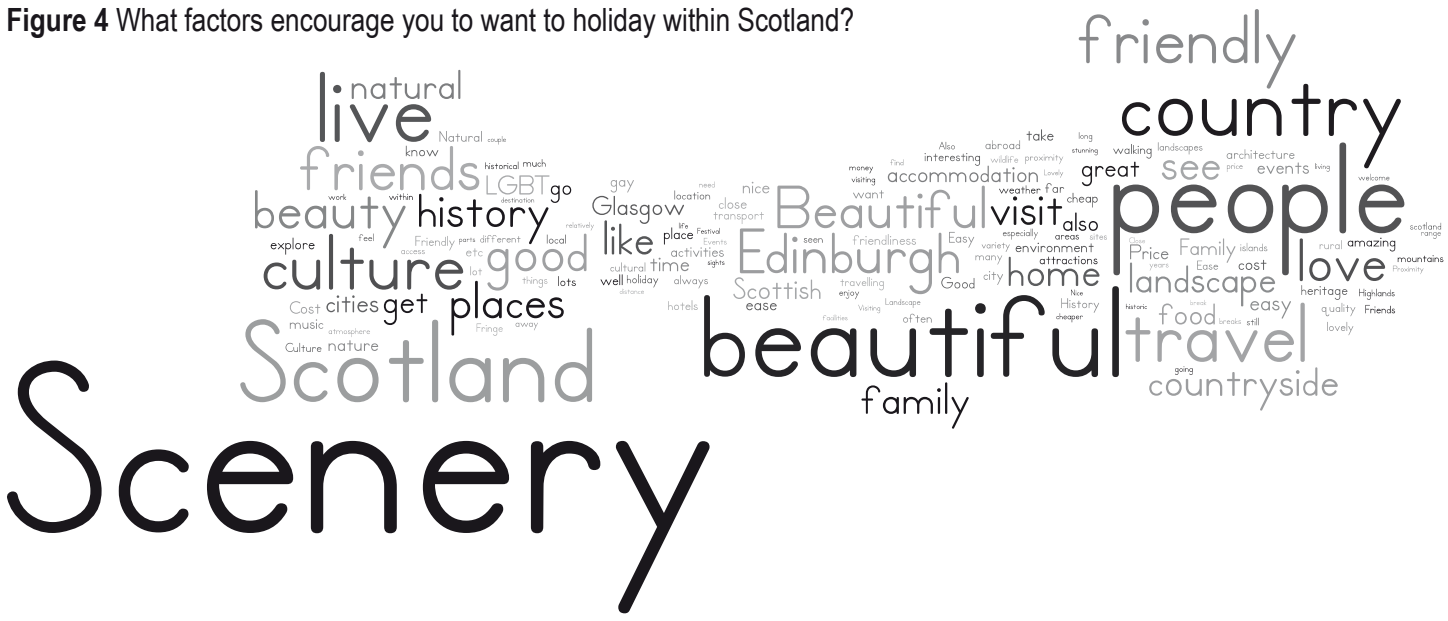


Image © VisitScotland / ScottishViewpoint

There were a large number of factors that encourage people to want to holiday in Scotland. The beautiful nature of Scotland's natural and built heritage, the friendliness of Scots, Scottish culture and history were prominent factors mentioned by participants.

We asked respondents what factors encouraged them to want to holiday in Scotland. Prominent words which were used by participants included 'beautiful' (**25%**), 'scenery' (**24%**), 'friendly' (**17%**).

Figure 4 What factors encourage you to want to holiday within Scotland?



> "The landscape is truly stunning. I particularly love the islands and highlands. I haven't yet managed to visit Shetland, but that is on my 'to do' list. I also love that Scottish cities are compact, you can get into all the nooks and crannies in Edinburgh Glasgow and St Andrews, climb a hill, eat in stunning restaurants, see amazing shows, visit castles and stately homes all in a couple of days."
>
> *Scotland*

> "Friendly people, beautiful natural environment (trees, mountains, animals, plants), rich culture and artistic, intellectual etc. scenes, reasonably LGBT* friendly especially since recent marriage legislation."
>
> *Wales*

The weather, cost and travel distance were the most mentioned factors that would influence travellers not to come to Scotland. The weather was mentioned by a considerable **42%** of respondents, followed by cost/expense (**15%**). The world famous Scottish Midge was mentioned by **2%** of respondents.

> "Friendly people, cool weather, liberal attitude compared to my home atmosphere, great beer and whisky, fascinating history, beautiful architecture, literary heritage, easy-to-access and beautiful natural environment."
>
> *United States*

Figure 5 What factors would influence you to decide not to take a holiday or short break in Scotland?

Alarmingly, despite advances in legislation to protect LGBT people from discrimination in the provision of goods, facilities and services, a number of respondents still had fears about being turned away from accommodation as a result of their partnership status demonstrating the clear need for a visible welcome for LGBT travellers to Scotland.

> "Just the weather!"
>
> *Belgium*

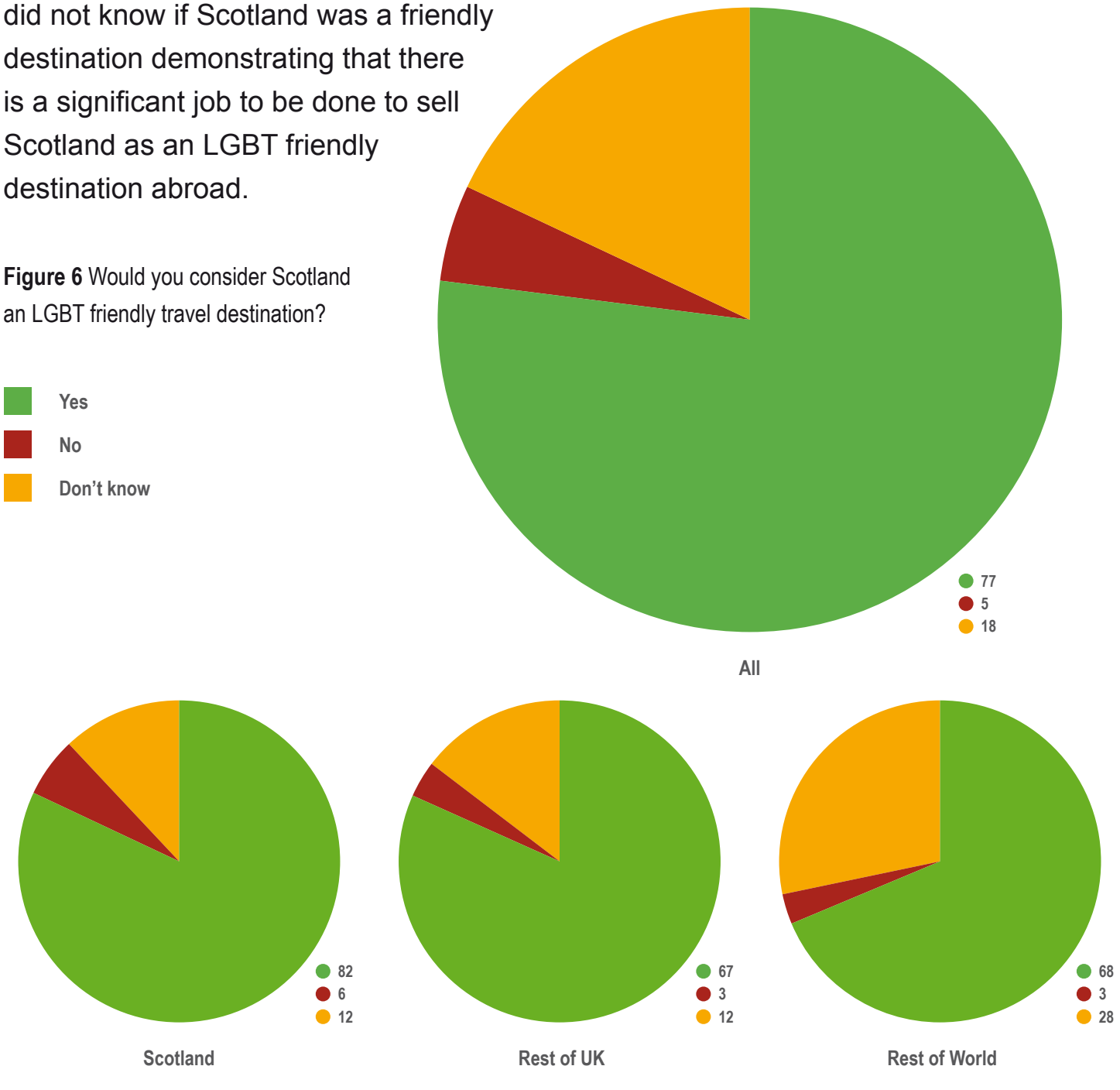
> "Still unsure about the reception from some smaller establishments of two women wanting a double room, particularly in the highlands and Islands. The weather!"
>
> *Scotland*

> "Going to a rural area you're just not sure what the attitudes will be."
>
> *England*

Over three quarters (**77%**) of travellers consider Scotland an LGBT friendly destination. This figure is **82%** for those living in Scotland and for respondents from the rest of the UK and the rest of the world this figure is **67%** and **68%** respectively. Almost a third of travellers from the rest of the world (**28%**) did not know if Scotland was a friendly destination demonstrating that there is a significant job to be done to sell Scotland as an LGBT friendly destination abroad.

> "Last time I was in Scotland (10 years ago) I felt I couldn't identify as being a lesbian as some of the rural areas seemed a little 'intolerant' of different lifestyles."
>
> *Australia*

Figure 6 Would you consider Scotland an LGBT friendly travel destination?



> "Certainly – LGBT people are protected through legislation, equal marriage just been passed, main cities have thriving LGBT scenes, and the people as a whole are friendly and welcoming!"

Northern Ireland

> "Scotland is a truly vibrant little country with a very welcoming population who, for the vast part are open-minded and tolerant. This was evident during the same-sex marriage debate."

Belgium

A significant **31%** of rest of UK travellers and **28%** of travellers from outside the UK say they don't know if Scotland is an LGBT friendly destination or not.

> "Honestly, it hasn't really been in my radar or neither a lot of my gay friends who live here in SF but I would like to know more."

United States

> "I haven't really heard either way, but I often regard no reputation as LGBT friendly as unfriendly, I find this is the safest approach to potentially hateful situations my partner and I could be victims of."

England

> "I have never considered it a LGBT destination."

Australia

Even amongst the **77%** of respondents who consider Scotland an LGBT friendly destination some still have concerns about travel to more rural and remote locations in Scotland. For many, cities are seen as more LGBT friendly. These concerns demonstrate the need to highlight the welcome LGBT travellers will receive all over Scotland, not just in the cities.

> "People's attitudes are certainly rapidly changing towards LGBT people even in some fairly remote locations where people may be less inclined to welcome LGBT people with open arms."
>
> *Scotland*

> "LGBT friendly in the cities, but I am less sure about more remote destinations (especially in the highlands and islands) and these are the areas I would really love to explore more."
>
> *Scotland*

> "Assumption is also that LGBT people will only want to visit the cities to go clubbing. There are also LGBT people who want to run, climb and cycle their way round Scotland's amazing landscape and want to be assured of a good service regardless of which area of Scotland they are holidaying in."
>
> *Scotland*

SECTION 3

SAME-SEX MARRIAGE TOURISM

On the 4th February 2014 Scotland became the 17th country in the world to legalise same-sex marriages when the Scottish Parliament passed the Marriage and Civil Partnership (Scotland) Act 2014. This historic law allowed same-sex couples to marry in Scotland for the first time, with the first same-sex marriage ceremonies taking place on 31 December 2014.

Scotland already has a considerable market in marriage tourism with **23%** of couples who married here in 2011 coming from outside Scotland and **24%** in 2012. Almost half of these tourist marriages take place in Gretna[2] on the Scottish border with England.

When considering what opportunities there might be to promote Scotland as a destination for same-sex marriages it is important to note that **39%** of respondents said they would consider travelling abroad to get married in a country which has legalised same-sex marriage (**12%** were not sure). Of those, **84%** said they would consider visiting Scotland to get married.

[2] General Register Office for Scotland

Figure 7 Would you consider travelling abroad to get married in a country which has legalised same-sex marriage?

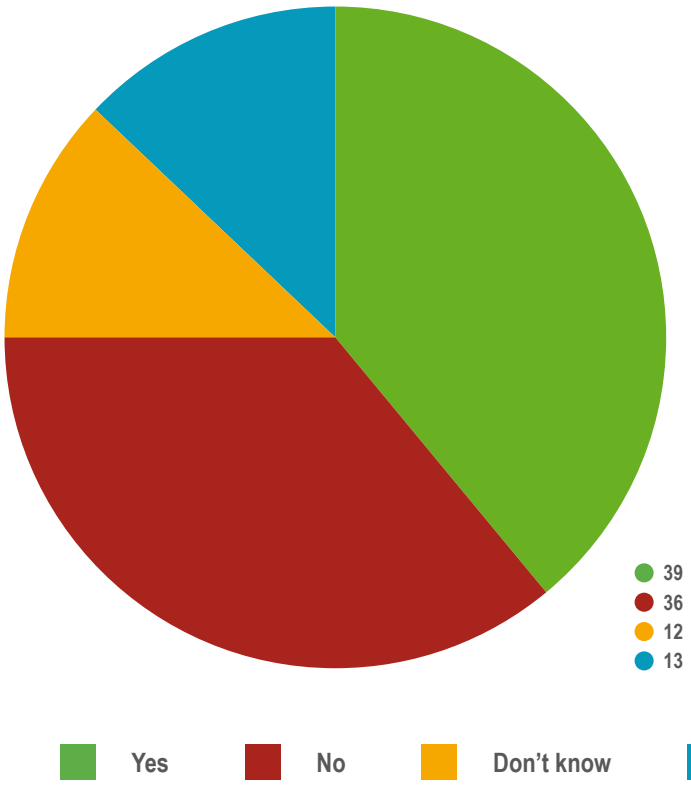
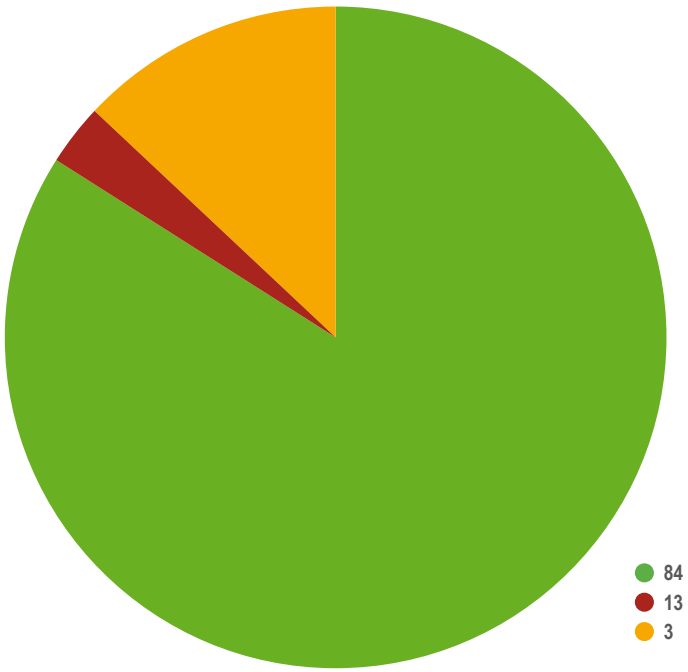


Figure 8 Would you consider getting married in Scotland?



Unsurprisingly **90%** of Scots would consider getting married in Scotland, the interesting figure in relation to tourism was that **74%** of rest of UK travellers and **70%** of rest of world travellers (who would get married abroad) would consider a same-sex marriage in Scotland. Only **6%** and **8%** respectively would not consider a same-sex marriage in Scotland.

These figures suggest there would be considerable opportunities for Scotland to market to couples as a destination for same-sex marriages.

Scotland has a wide range of historic and/or interesting venues that host marriages, and same-sex marriages can be performed by registrars or by a number of religious or belief organisations.

The Scottish Wedding market was worth a massive £537 million to the Scottish economy in 2013[3] and with hundreds of same-sex couples set to marry in 2015 there are huge opportunities for the wedding sector.

[3] http://www.dcthomson.co.uk/media/scottish-wedding-census-2014-results-unveiled

SECTION 4

A WELCOMING SCOTLAND

Image © VisitScotland / ScottishViewpoint.

In 2014 Scotland welcomed the world to join in the exciting Year of Homecoming. In addition to the Commonwealth Games, Ryder Cup and MTV Europe Awards there was a wide programme of events and activities to showcase all that's great about Scotland. Some of the activities were LGBT focused events, open to LGBT travellers.

Among our LGBT audience, awareness of Scotland's big year was high for Scottish respondents. In advance, the Commonwealth Games received the highest awareness (**98%**), followed by Homecoming Scotland (**65%**), the Ryder Cup (**59%**) and the MTV Europe Awards (**35%**). Both the rest of the UK and rest of the world respondents knew of the Commonwealth Games more than the other events.

These figures no doubt increased as these events were showcased to a global audience.

YEAR OF FOOD & DRINK SCOTLAND 2015

In 2015, Scotland welcomes the world to the Year of Food and Drink celebrating the country's outstanding natural larder and produce. Enjoy brilliant moments packed with regional delights and discover the landscapes, people and culture that make Scotland's food heritage so unique.

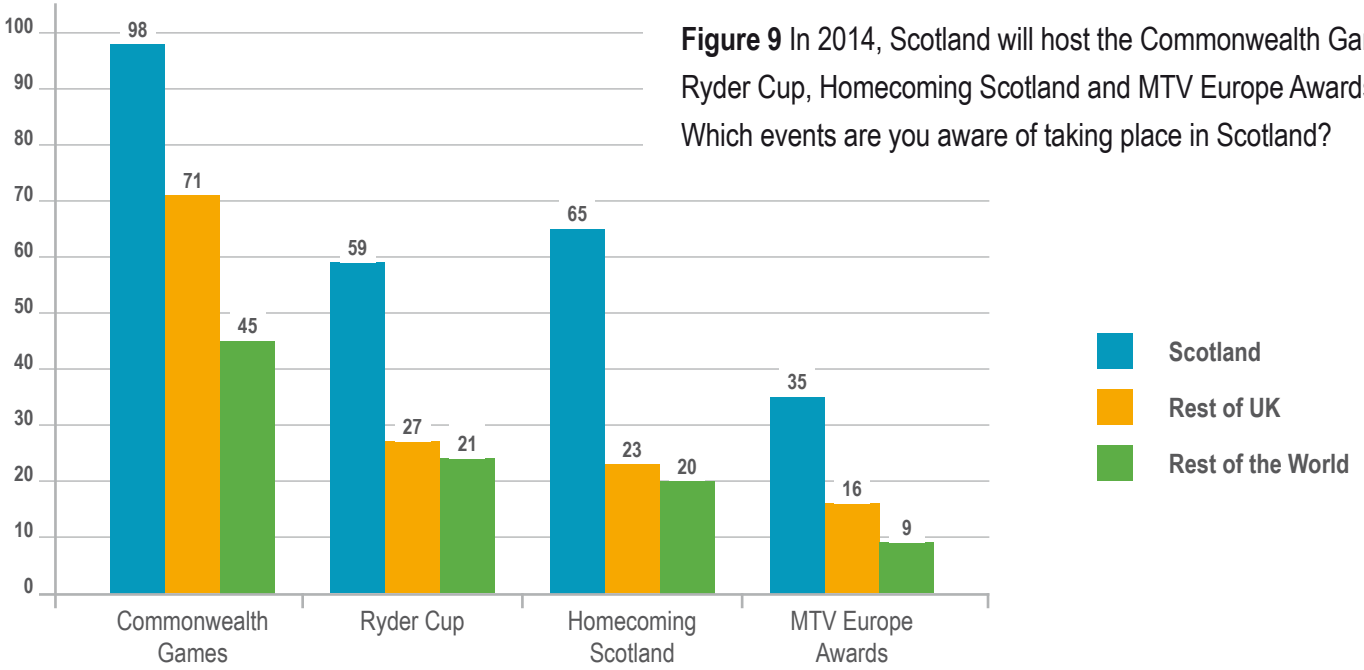


Figure 9 In 2014, Scotland will host the Commonwealth Games, Ryder Cup, Homecoming Scotland and MTV Europe Awards. Which events are you aware of taking place in Scotland?

Asked what Scotland can do to provide an even warmer welcome to LGBT visitors in 2014 and beyond, many people talked about providing more and better information to LGBT travellers.

"Provide travel information that specifically targets the LGBT community."

Canada

"Make sure LGBT are aware of Scotland being a safe and welcoming place; where they will have a great time!"

United States

"Mention us in brochures and provide specific brochures and information on relevant websites and apps."

Australia

"Up to date information, have found myself current information several years out of date."

Spain

"More specific information about gay-friendly things to do and see on tourism/event websites."

Germany

SECTION 5

LGBT TRAVEL

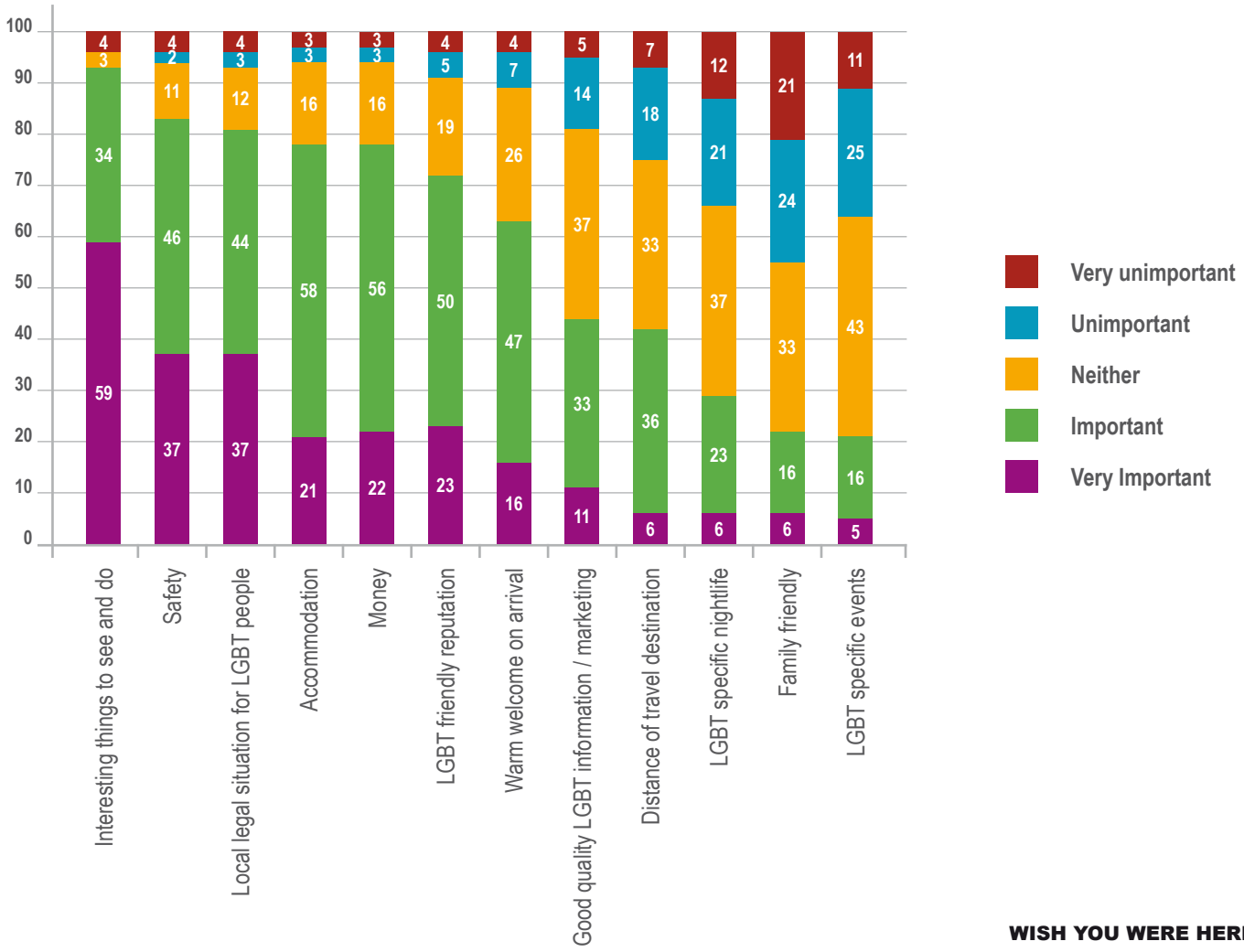
Many destinations around the world actively and prominently market to LGBT travellers

Photo credit: torbakhopper / Foter / CC BY

When it comes to deciding where to go on holiday or take a short break, LGBT travellers have to consider the same factors as non-LGBT travellers. However, they also have to think about a range of other factors not necessarily always important to non-LGBT travellers which is borne out by this research. These factors often include how welcome they would be at certain destinations, how they would be treated at their accommodation, and even how safe they would be walking down the street; all of which are fundamental considerations that drastically impact on destination choices for LGBT visitors.

The most important factor when choosing a destination was having interesting things to see and do (**93%**) a result which would be unsurprising in any survey of travellers. The second and third most important factors however highlight the very specific needs of LGBT travellers, **83%** cited safety and the local legal situation for LGBT people was mentioned by **81%** as either important or very important, and slightly further down

Figure 10 Please tell us what factors are important to you when choosing a travel destination?



the list, in sixth place, **73%** said an LGBT friendly reputation was an important factor. These results highlight the work Scotland would have to do to create a welcoming and inviting environment for LGBT travellers and should be the focus of any key messages for LGBT travellers around the globe.

Having LGBT specific nightlife (**29%**) or events (**21%**) was not the highest in many travellers' considerations, although still important to a quarter of LGBT travellers.

Money (**78%**) and accommodation (**79%**) were fourth and fifth most important considerations, and other factors which were mentioned by travellers included the range of food available and language spoken. It is interesting to note that whether travellers were from Scotland, the rest of the UK or the Rest of the world, these results did not greatly vary.

We asked respondents where comes to mind when thinking about LGBT friendly destinations. A combination of cities, regions and countries were given as answers by respondents. San Francisco was by far the most mentioned and maintains a worldwide reputation as an LGBT friendly destination.

In Scotland, Glasgow and Edinburgh were perceived as the most LGBT friendly destinations. Scotland itself only received 23 mentions, just **3%** of respondents, despite most respondents living in Scotland. A total of 123 destinations were given as answers to this question.

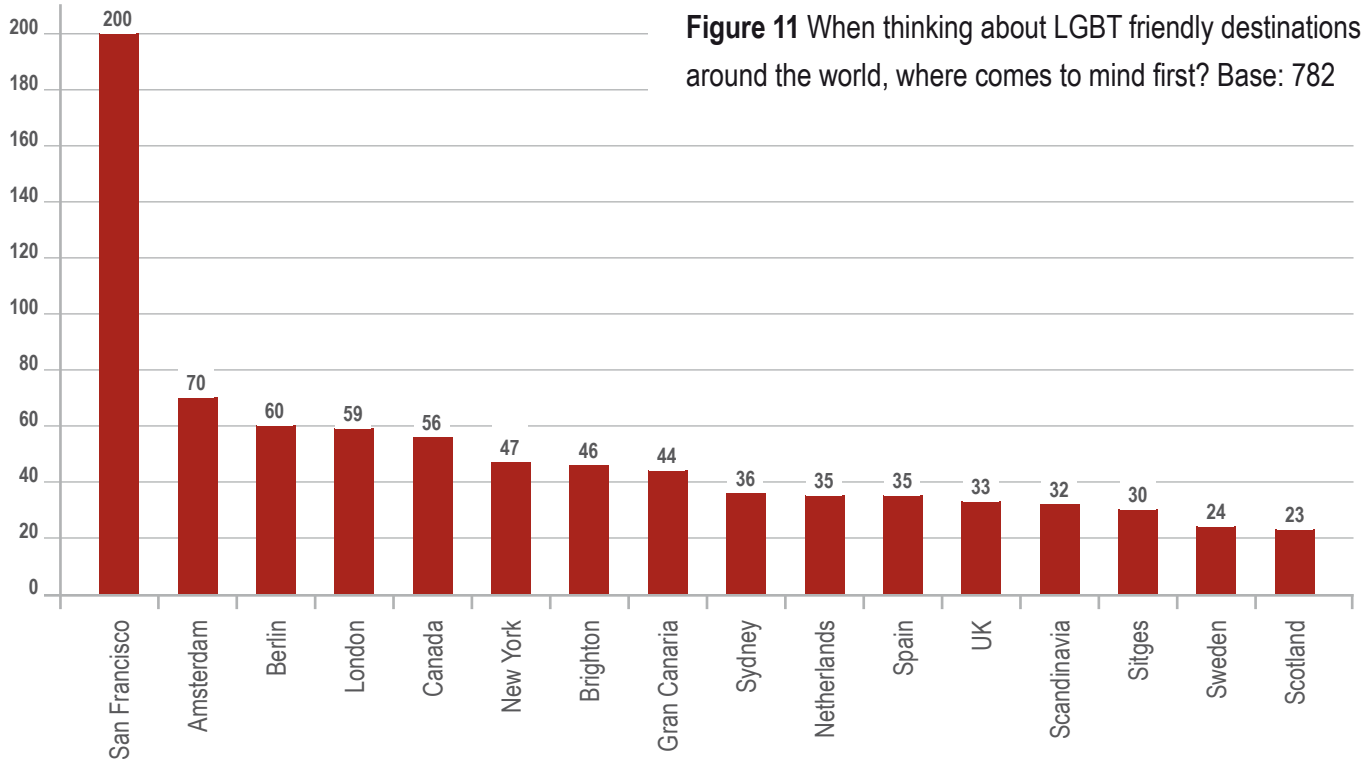


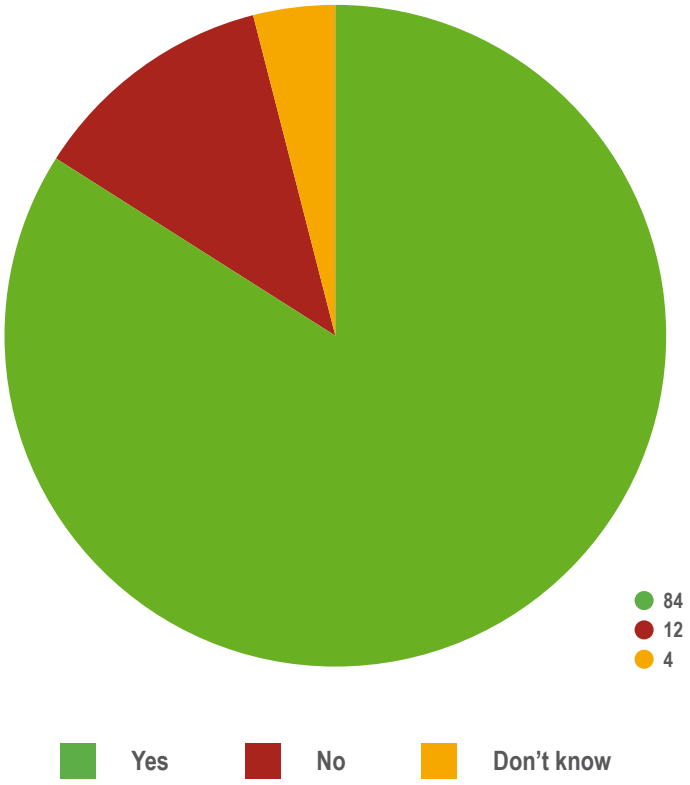
Figure 11 When thinking about LGBT friendly destinations around the world, where comes to mind first? Base: 782

One potential barrier that LGBT travellers face is the presence in some countries of anti-LGBT laws. Being gay is still illegal in 78 countries in the world.

Even where it is legal to be gay there are often country specific customs that may need to be noted, for example holding a partner's hand in public. **84%** of LGBT travellers said they familiarise themselves with the laws and customs of a destination before travel, **12%** do not and **4%** were unsure.

In Scotland homosexuality was legalised in 1981, and the United Kingdom has ranked 1st in the ILGA Europe Rainbow Map for a number of years as the country in Europe with the most progressive laws for LGBT people. Information on Scotland as a modern and progressive country would help LGBT travellers when deciding on their destination.

Figure 12 In general, do you familiarise yourself with the laws and customs of a destination before you travel?



> "I would definitely avoid holidaying with my partner in any country I knew to have specific homophobic laws, so would check out the human rights record and find out what the legal situation is before travelling overseas."
>
> *Scotland*

> "Ignorance is no defence in law. When you visit another country you are a visitor and ambassador. Even laws you disagree with you must be prepared to comply with or choose a different destination."
>
> *Australia*

SECTION 6

LGBT TRAVEL INFORMATION

Image courtesy of T in the Park.

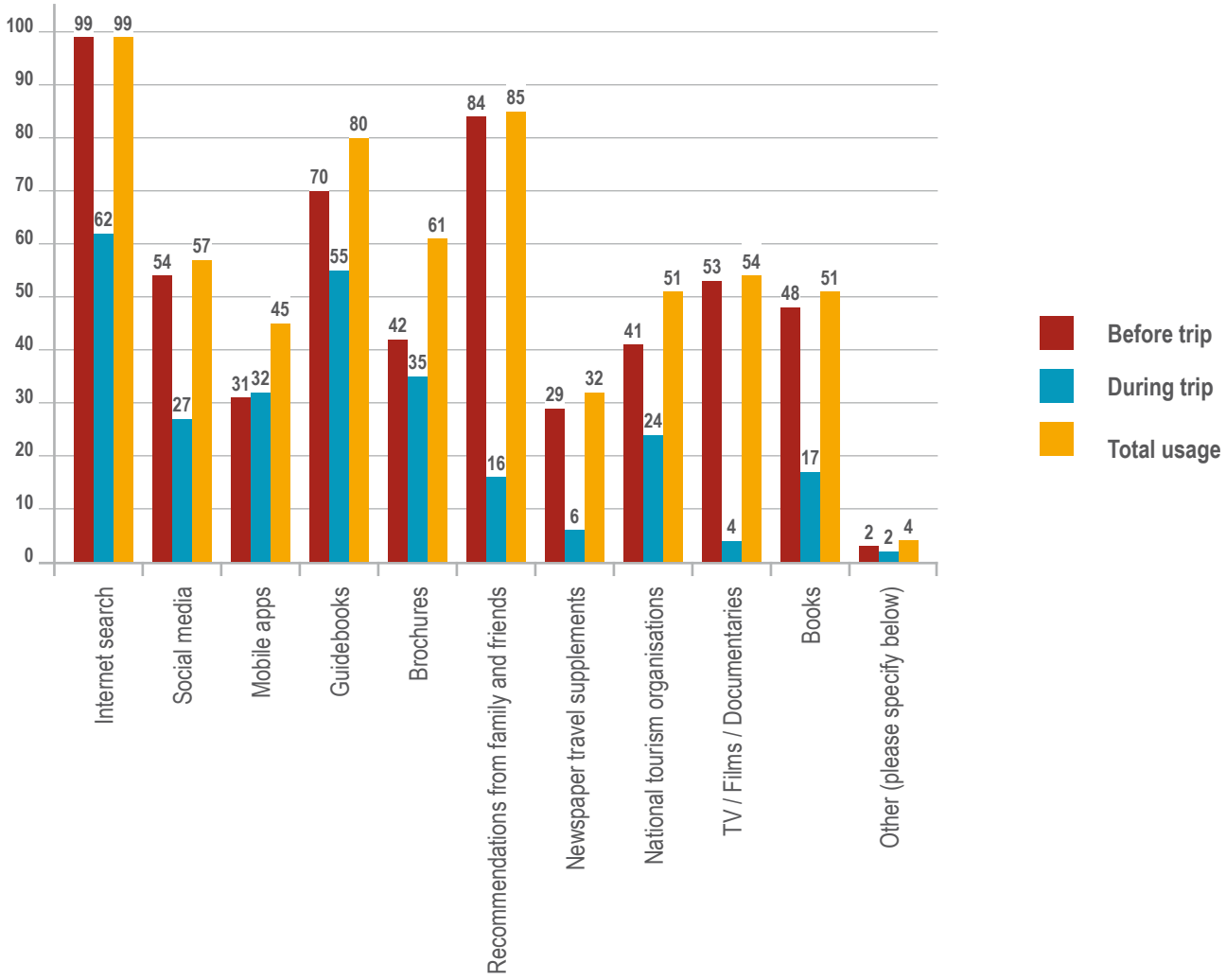
LGBT people use a range of information sources when researching a destination, like non-LGBT people. In this section we look at where LGBT people get their information and where they share information about their trip.

Overall, internet searches dominate where LGBT people get their travel information (**99%**), followed by recommendations (**85%**), guidebooks (**80%**), brochures (**61%**) and social media (**57%**). While just under half used mobile apps (**45%**), mobile apps were the only resource used more during the trip than before the trip.

Before the trip, almost everyone looked online (**99%**), **84%** got recommendations, **70%** got information from guidebooks and **42%** from brochures.

During the trip, sources of information change somewhat with internet search (**62%**) guidebooks (**55%**), Brochures (**35%**) and Mobile apps (**32%**) being most frequently used.

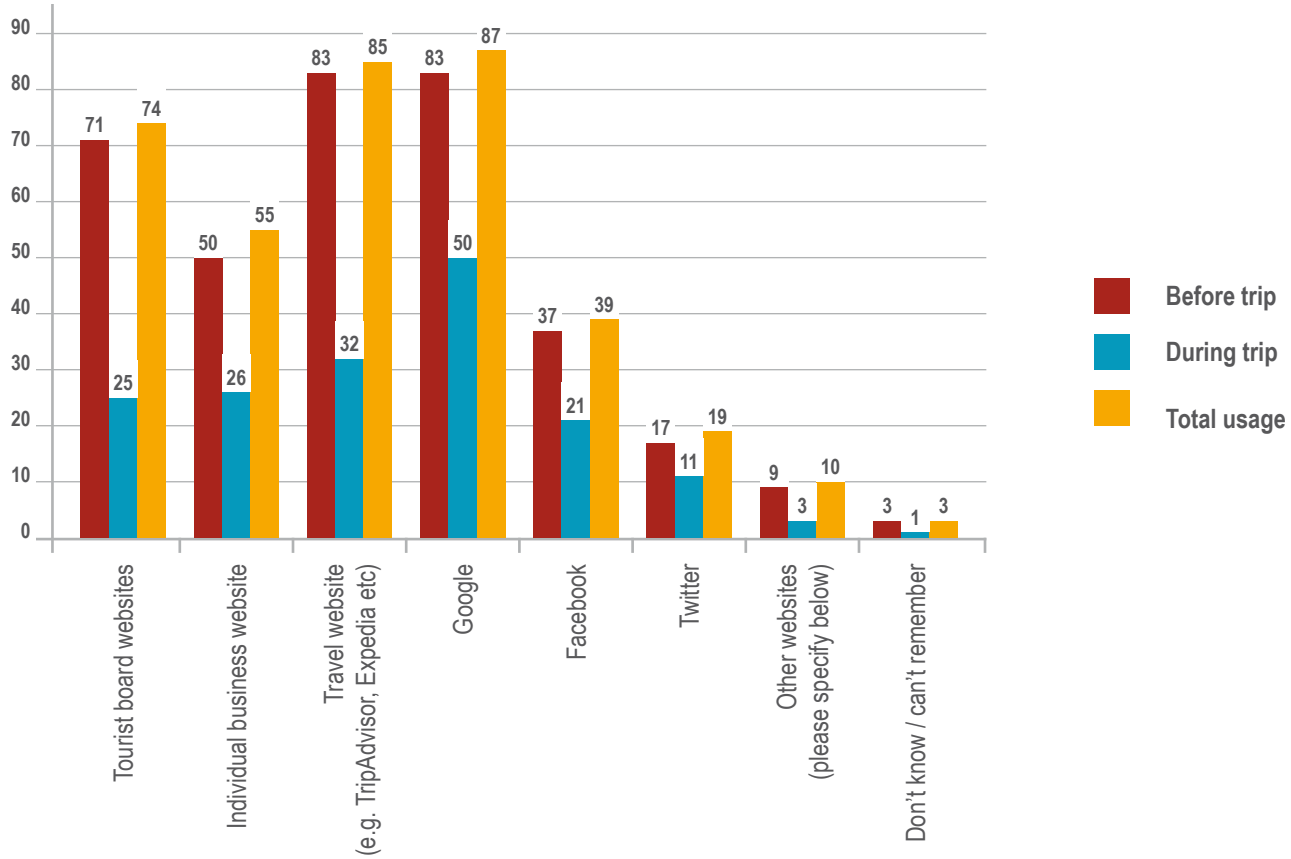
Figure 13 Please tell us what factors are important to you when choosing a travel destination?



For those using the internet to research a destination Google (**87%**) and travel websites (**85%**) were most used; evidently both before and during travel. These were followed by tourist board websites (**74%**) and individual business websites (**55%**). Of those that used Facebook (**39%**) and Twitter (**19%**), most used these before travel and quite often during the trip as well, in comparison to other websites.

During the holiday, Google remains popular (**50%**) followed by travel websites (**32%**) and individual business websites (**26%**). Overall, usage of these key websites drops for everyone during the trip.

Figure 14 Please tell us what factors are important to you when choosing a travel destination?



Laptops are the most commonly used method of getting travel information (**84%**), particularly before the trip (**82%**). Mobile and Smart Phones were the only medium used more frequently during the trip (**68%**) than before (**51%**). Unsurprisingly while use of laptop and desktop computers dropped off considerably during the trip the use of tablet computers remained broadly similar.

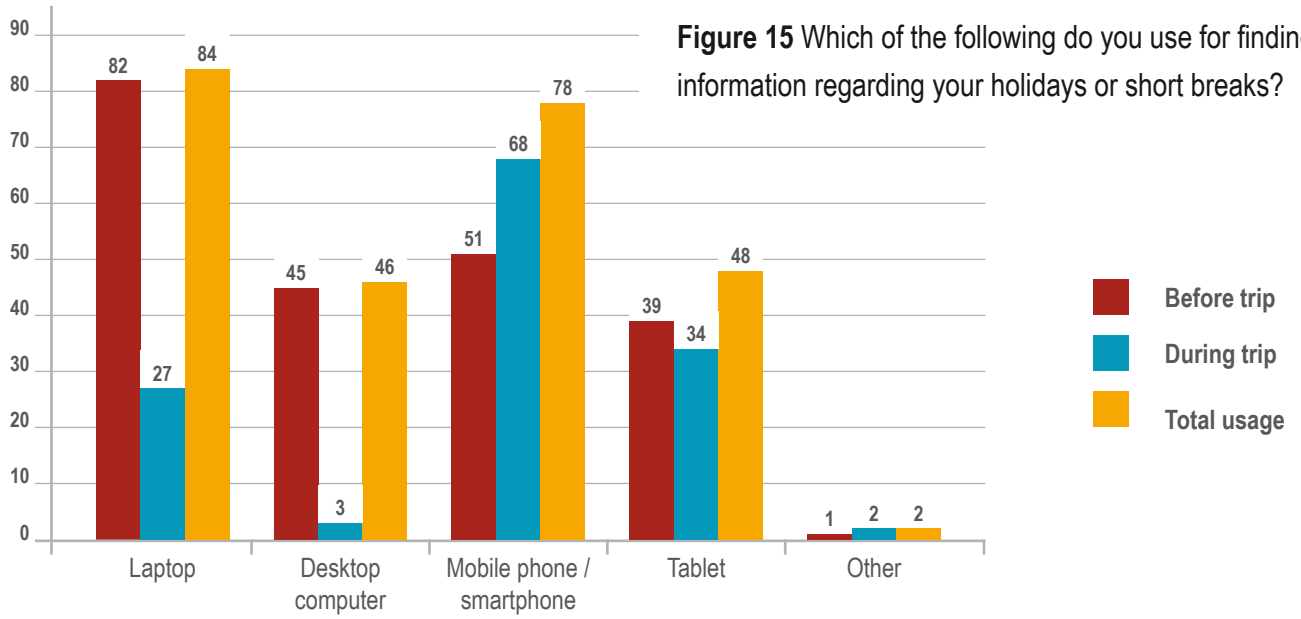


Figure 15 Which of the following do you use for finding information regarding your holidays or short breaks?

Over half (**53%**) of respondents look for LGBT specific information for their holiday or short break. This can include getting information about LGBT friendly accommodation providers, LGBT bars, clubs, events and nightlife and legal status for LGBT people in destination countries. While accommodation (**96%**), travel info (**92%**) and things to see and do (**95%**) were the most common information sought by travellers, this result shows the need to develop LGBT specific information for travellers in advance of their trip.

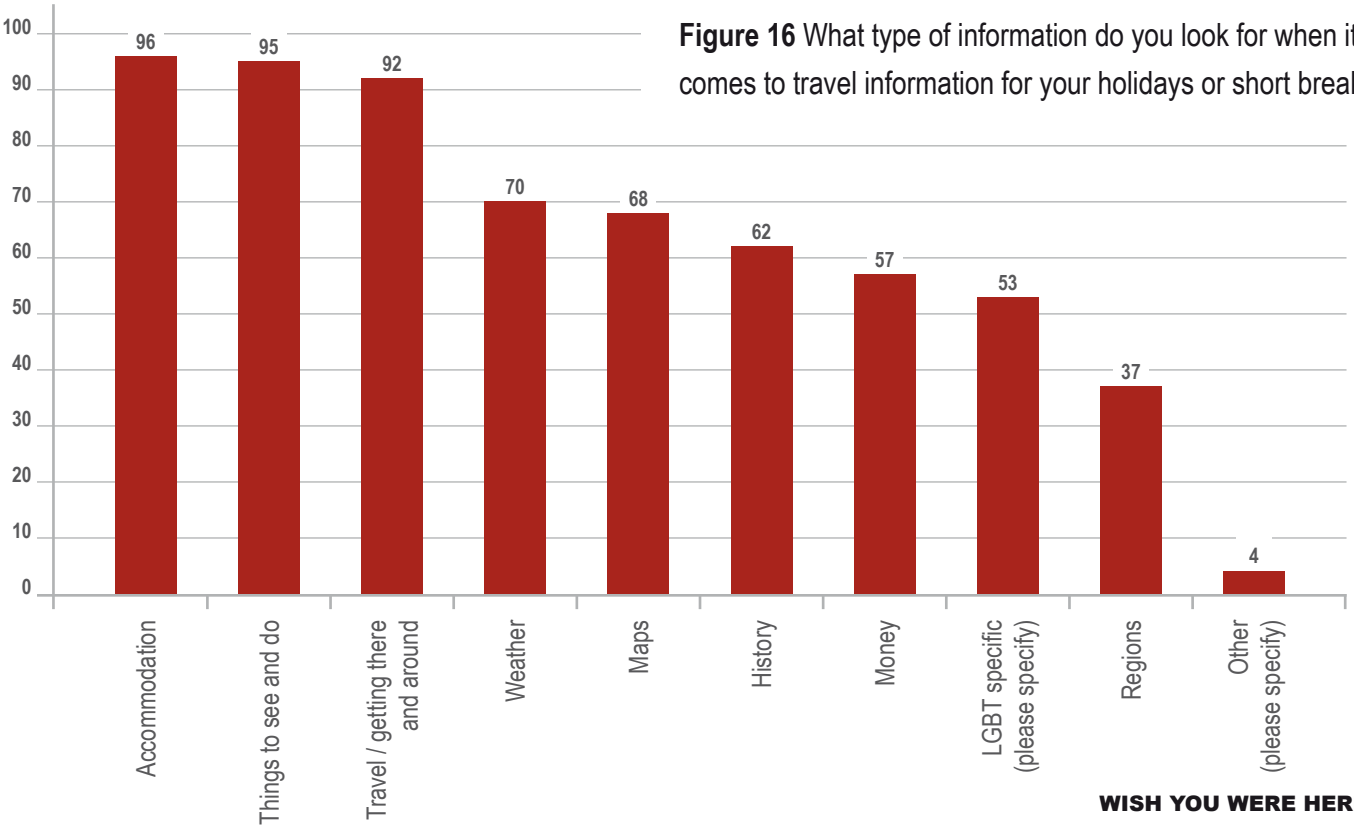


Figure 16 What type of information do you look for when it comes to travel information for your holidays or short breaks?

There are many different travel apps on the marketplace, some giving specific information about a single destination, and others more like mobile travel guides. Apps have both benefits and drawbacks in that they can provide up to date mapping and event information to travellers, but can be costly in foreign data charges.

Over half of travellers (**56%**) use travel apps on a smartphone, tablet or mobile device before or when they arrive in a destination. This figure was the same regardless of the traveller's origin.

Just under half (**48%**) of those who say they use travel apps say they would be willing to pay a small fee to purchase one, with a further **24%** saying they were not sure.

Figure 17 Do you use travel apps on your smartphone, tablet or mobile device before or when you get to a destination?

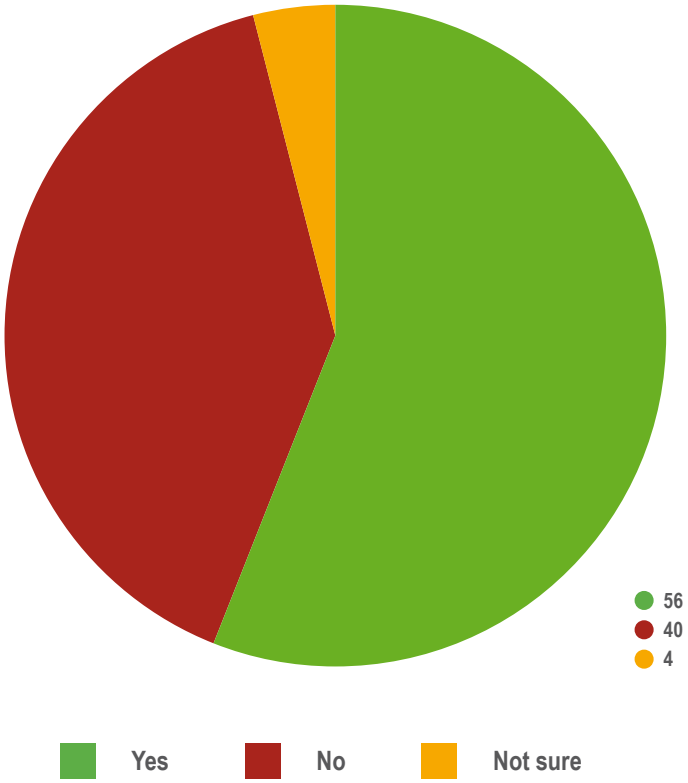
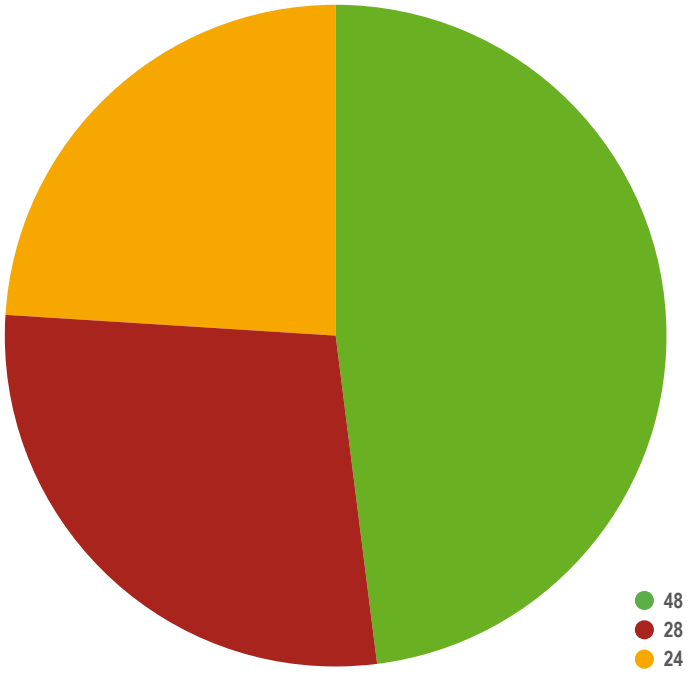
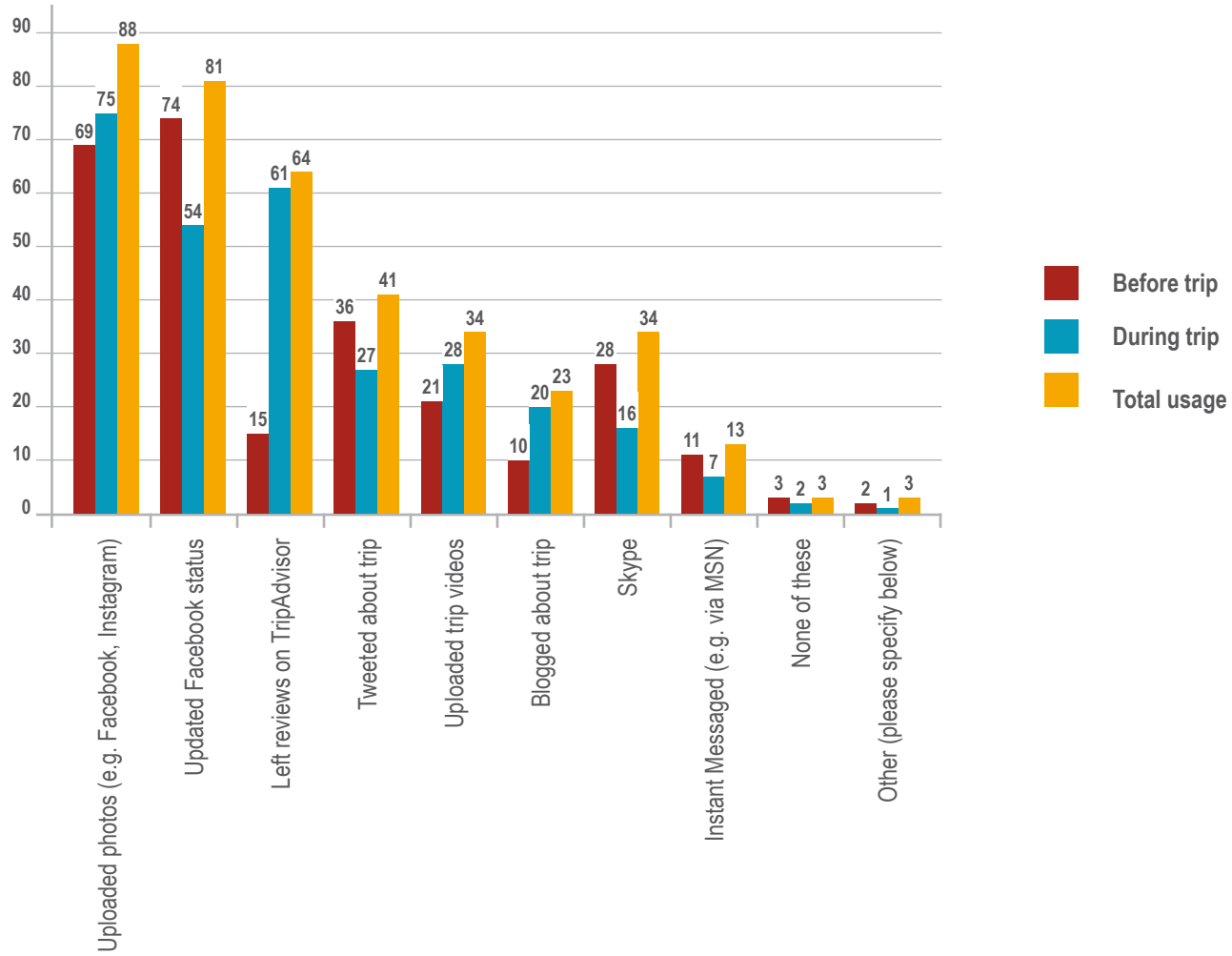


Figure 18 Would you be willing to pay a small price (e.g. £0.69 / $1.20 / €0.85) to purchase an app?



Social media websites were seen as popular tools both before and after holidays and short breaks with well over three quarters of travellers using them to post photos or update a status. Leaving reviews on sites like TripAdvisor after a trip was also popular with over 6 in 10 users saying they had done so.

Figure 19 Which of the following do you do, both before and/or after your trip?



Clearly, from the results of this survey, we can see LGBT travellers are seeking LGBT information, and they want this information via a number of sources.

Currently there is little LGBT specific information available to LGBT travellers on Scotland with the exception of our two biggest cities of Glasgow and Edinburgh.

SECTION 7

CONCLUSIONS

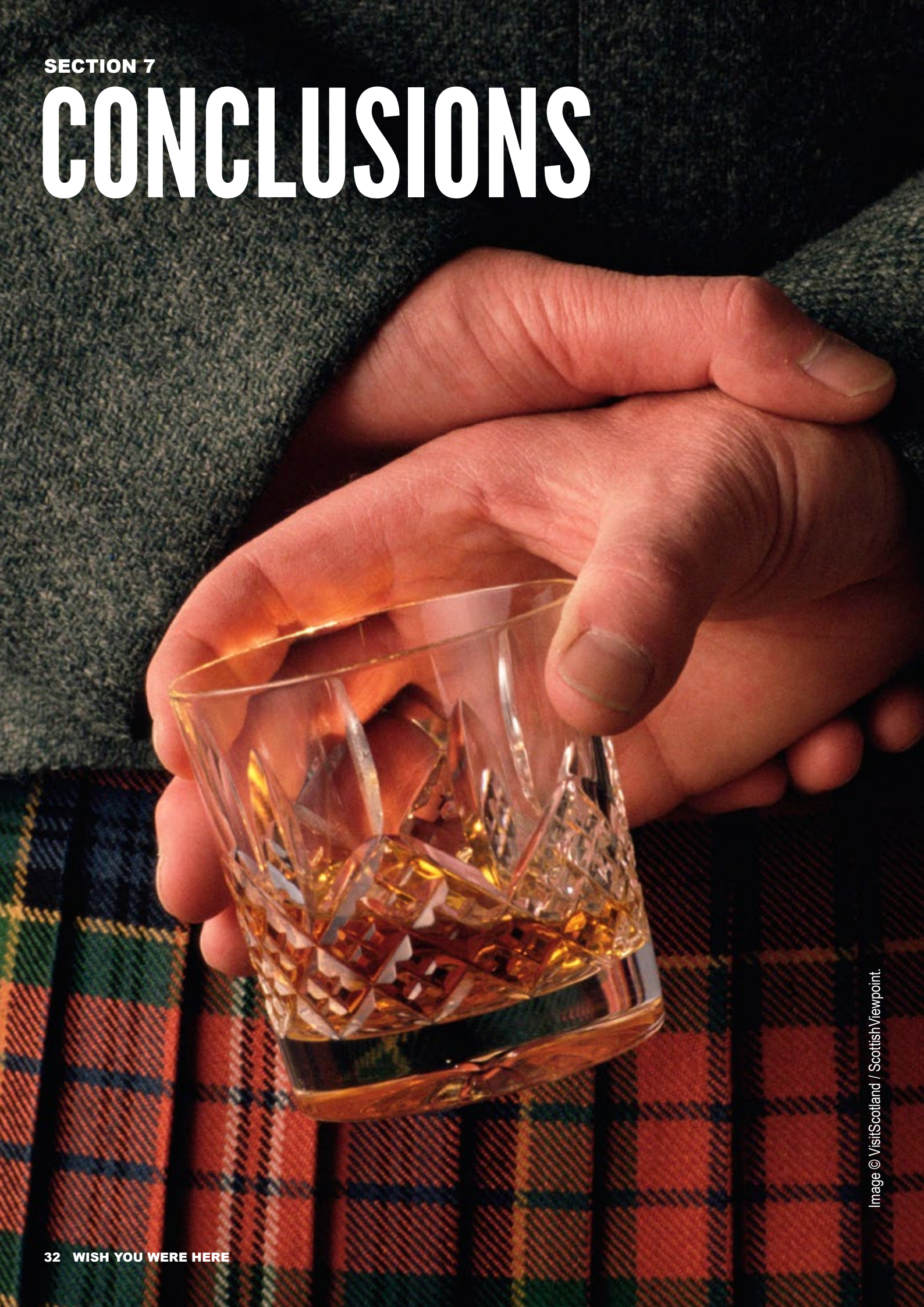


Image © VisitScotland / ScottishViewpoint.

As this research shows when it comes to travel, LGBT people are not that dissimilar to their non-LGBT counterparts in what they look for in a holiday destination and where they get their travel information, however, there are a few key and important differences.

For the LGBT traveller issues around safety, the local LGBT legal situation and indeed how they can expect to be welcomed are key factors weighing on the minds of LGBT individuals when thinking about where to go next.

Feeling welcome is clearly very important to LGBT travellers and whilst the perception that Scotland is an LGBT friendly destination is quite high among Scottish LGBT travellers, there is a need for improvement among LGBT individuals from the rest of the UK and abroad (**68%**).

In the first instance, a mere statement of an LGBT friendly welcome would evidently go a long way towards improving Scotland's reputation as being LGBT friendly.

RECOMMENDATION

Scotland's tourism sector can and should do more to explicitly market Scotland as an LGBT friendly travel destination, extending a welcome to LGBT travellers.

While having LGBT marketing, specific events or nightlife for LGBT people was certainly not the most important factor when choosing a destination, it was either important or very important to around a third of LGBT travellers and over half of the LGBT travellers surveyed sought out LGBT specific information in advance of travel to a destination.

RECOMMENDATION

Travel resources should be created to encourage LGBT travel to Scotland, providing LGBT specific information and explaining how progressive and welcoming Scotland is as a destination.

Despite the law on access to goods, facilities and services some respondents still have concerns about being denied access to hotel rooms, especially in more rural parts of Scotland.

RECOMMENDATION

LGBT travellers should be made aware of the law on equal access to services and more examples of LGBT friendly accommodation in rural parts of Scotland.

Opportunities around marriage tourism, in light of recent changes in legislation, clearly exist. With **64%** of those who think they might travel somewhere else to get married saying they would consider Scotland (just under 4 in 10) it is clear the message of a warm and friendly welcome is necessary to ensure Scotland does not miss out on the economic benefits of this aspect of the LGBT market.

RECOMMENDATION

Scotland should take advantage of new same-sex marriage legislation and promote itself as a same-sex marriage destination.

While we know there are huge benefits to the Scottish tourism industry of ensuing a warm welcome to LGBT travellers there is also a greater prize.

Welcoming LGBT people to Scotland from all over the world can only help bring greater understanding of different people and cultures, ensuring that Scotland's equality and human rights journey continues.

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