This letter responds to the invitation from the Commons Environment, Food and Rural Affairs (EFRA) Select Committee to submit evidence to their inquiry into the role of tourism in supporting rural growth in England.

Tourism is identified as a key economic sector within our Programme For Government and also our Government Economic Strategy. Tourism directly supports the continuing strategic economic focus on the four pillars of innovation, investment, internationalisation and inclusive growth within that strategy.

Our key issues in respect of the relationship with VisitBritain are set out in Annex A.

Growing a resilient economy will be key to Scotland’s success in the face of the continued economic and fiscal uncertainty. We would certainly recognise the picture the Committee presents that some:

“rural communities face some particular challenges to tourism growth such as transport connections, restrictions to broadband access and seasonal employment.”

These are also challenges which Scotland’s tourism industry faces and much in relation to these policy areas is devolved. Action to deliver sustainable economic growth is being pursued successfully through Scottish initiatives such as the Tourism Skills Investment Plan work, our own economic strategy and working collaboratively with partners in the delivery of the industry-led Scottish Tourism Alliance “Tourism Scotland 2020” strategy. Information on a number of these, aligned to the broad headings of the EFRA inquiry, is set out in Annex B.

As Annex A highlights, the Scottish Government is committed to working with the UK Government and the other devolved administrations to maximise sustainable tourism growth.

However, we remain concerned that we are not always treated as an equal partner in that process in the promotion of the UK as a gateway destination and that our interests, and those of the other devolved administrations, are not fully taken into account in policy development and the delivery of activity.

Actions such as the recent publication of the UK Government Tourism Action Plan (which was not subject to prior consultation despite a commitment to doing so) and the development of the UK Government Industrial Strategy (with a strong emphasis on a “tourism industry deal” being offered) support those concerns.

In addition, my recent Brexit Stakeholder events with key organisations and individuals across culture, creative industries and tourism show the effect of industry uncertainty on investment and expansion plans. The Scotland’s Place in Europe document sets out the Scottish Government’s position following the result of the EU referendum. While the UK Government’s position is only now becoming clearer, including the triggering of Article 50, the challenges posed by the EU referendum result are unprecedented and will impact on
our people, businesses and investors and our collective ability to tackle complex, interdependent domestic and international challenges.

Thank you for the opportunity for present evidence to the Inquiry. My Officials will be available for evidence on 29 March and for any subsequent queries.

ANNEX A

RELATIONS WITH VISITBRITAIN

SPECIFIC ROLES FOR VISITSCOTLAND
Tourism is vital in supporting some of our most fragile communities. Despite challenging fiscal settlements and recognising the economic impact that sustainable tourism already has (and can have in the future) the Scottish Government continues to maintain its levels of financial support for VisitScotland. In 2017/18 its resource budget will remain at £40.4 million.

As the lead delivery agency for the visitor economy within Scotland, VisitScotland will continue to focus resources on marketing Scotland as a tourism destination with the aim of attracting domestic and international visitors.

Scottish Ministers have set the strategic direction that VisitScotland must work to encourage longer visits and increased spending, working with industry and enterprise partners to address productivity barriers, increase quality and service and encourage innovation, in line with targets set out in the Scottish Tourism Alliance (STA) “Tourism Scotland 2020” strategy. By prioritising digital capability, leadership, investment and providing a quality experience, we aim to increase spend to over £5.5 billion by 2020.

In doing so, it will be important to learn from our international competitors, to build new alliances across enterprise sectors, to enhance our digital capabilities, explore new markets and products and develop long term investment plans that build on our many strengths.

For example, our international reputation as a destination continues to grow, with our Nation Brand Index (NBI) Score rising from 17th to 15th overall in the 2016 rankings (and 12th for tourism).

VisitScotland is committed to working with local partners to continue to deliver economic impact and support new and imaginative initiatives that attract visitors to rural communities. The successful partnership between public and private sector in the development of the North Coast 500 is an excellent example of this approach.

WORKING WITH VISITBRITAIN
However, we recognise that there is always more we can do within the steadily increasing global tourism market. Bearing in mind that the UK NBI ranking is 5th for tourism, VisitScotland will continue to look for opportunities to work closely with VisitBritain to encourage international visitors beyond London - and preferably towards Scotland.
VisitScotland generally has a good working relationship with VisitBritain which we view as one of our key strategic partners. The VisitScotland Chair also sits as ex-officio member of the VisitBritain Board and the VisitScotland Chief Executive meets regularly with the CEO of VisitBritain and the other National Tourism Organisations (NTOs).

VisitBritain is also working in partnership with one of the major DMOs in Scotland - Visit Inverness Loch Ness (as well as VisitScotland) – as part of a four year £2 million GREAT marketing activity. Launched in March 2016, the consumer media campaign targets a number of key international markets.

VisitBritain also has access to the GREAT campaign budget which, we understand, stands at £60 million over the lifetime of the next UK Parliament. The GREAT budget covers Trade & Investment and Education as well as Tourism (and apparently the further sub-sector of Business Events) and therefore only a proportion of the £60 million is available for Tourism-related activity across the UK as a whole. However, it is still important that Scotland, along with the other devolved administrations benefits from a fair share of that budget.

**KEY ISSUES FOR THE FUTURE**

VisitScotland already provides a global marketing platform, together with opportunities for engagement through business development missions or attendance at trade fairs and is currently seeking to develop a common and consistent marketing brand for all of Scotland that has international appeal and builds on the success of the *Spirit of Scotland* campaign.

VisitScotland already work well with VisitBritain in emerging markets (e.g. India and China), where they support our Business Development Missions. This is where VisitBritain can add value to the work of VisitScotland.

However, VisitBritain remain active in established markets where VisitScotland is already successful. There is a risk therefore that Scotland, and other Devolved Administrations, becomes only one of numerous UK-wide destinations, thereby diluting the impact of our respective NTO activity, and the VisitScotland tourism brand.

The Scottish Government has expressed concerns around a number of common tourism issues, principally the UKG/VisitBritain approach to working with the Devolved Administrations in a manner demonstrating our status as key policy stakeholders and equal partners in the promotion of the UK as a gateway destination.

Actions such as the recent publication of the UK Government Tourism Action Plan (which was not subject to prior consultation despite a commitment to doing so) and the UK Government Industrial Strategy (with a strong emphasis on a “tourism industry deal” being offered) suggests there is increasing confusion between the promotion of the UK, as a gateway destination, and the promotion of England (especially London) as a destination in its own right.

We would seek positive action and assurances from VisitBritain to ensure that there is no blurring between the roles of VisitBritain and Visit England and that the devolved administrations benefit from appropriate levels of funding and activity.
SCOTTISH GOVERNMENT ROLE

Tourism is identified as a key economic sector within our Programme For Government and also our Government Economic Strategy. The Programme for Government is an ambitious programme, which will come about only through hard work, determination, attention to detail, and a belief in what we can achieve together.

Tourism is wholly aligned with our continuing strategic economic focus on the four strategic pillars of investment in people and infrastructure, innovation, inclusive growth and international engagement.

The Scottish Government and the tourism industry share a strategic vision of Scotland as a destination of first choice, alongside our minimum £1 billion shared growth ambition, as set out in the industry-led Scottish Tourism Alliance “Tourism Scotland 2020” strategy.

Our public bodies, including VisitScotland as the national tourism organisation (and the lead agency in the visitor economy) work with the Scottish Government to provide a stable and certain economic foundation.

This is in addition to building on the legacy of the Commonwealth Games and Ryder Cup, with our investments in the 2018 European Championships, the 2019 Solheim Cup, the UEFA Euro 2020 Championships and both the Scottish Open and Ladies Scottish Open.

With regard to Scotland’s rural areas, the Scottish Government is committed to ensuring a supportive business environment in rural Scotland conducive to delivering sustained economic growth, and recognises the significant contribution that rural businesses and communities make in driving sustainable economic growth.

INCLUSIVE GROWTH

As a key growth sector, collaboration across sustainable tourism has already seen our visitor spend rise to over £5 billion for the first time and the numbers employed in the sector grow to 217,000 in 2015 – around 8.5% of Scotland’s employment.

It is important though to ensure that these jobs span the full range of employment opportunities, from apprenticeships to highly skilled leadership and management roles and that all partners (private and public) play an appropriate role in relation to the implementation of the Skills Development Scotland “Tourism Skills Investment Plan.”

Over the next year there will be a strong focus on pursuing inclusive growth, including through inclusive tourism, and employability right across Scotland. Creating sustainable inclusive economic growth that provides more employment, better quality jobs and equality of opportunity is crucial to developing Scotland’s economy in partnership with businesses and communities to improve people’s opportunities through work, which is fairly paid.
STRATEGIC ALIGNMENT & A REVISED TOURISM SCOTLAND 2020 STRATEGY

Since 2012 the Scottish Government and its public agency partners, together with the Scottish Tourism Alliance (STA) and tourism industry leaders, have been working to build better tourism businesses, right across Scotland, aligned to the industry-led “STA Tourism Scotland 2020” strategy.

The Scottish Government fully recognises the importance of tourism to the economy right across Scotland, urban and rural. As well as working with the private sector, third sector and relevant local authorities, growth in sustainable tourism is supported through the collective work of a range of public bodies.

These include VisitScotland’s national and international marketing campaigns; business and destination support from Scottish Enterprise and Highlands and Islands Enterprise; training and development through Skills Development Scotland; promotion and enhancement of the natural environment through Scottish Natural Heritage; and promotion and enhancement of Scotland’s historic environment through Historic Environment Scotland.

Following the 2016 mid-term review of the “STA Tourism Scotland 2020” strategy this collective action has focussed on the industry’s four key priorities of leadership, digital, visitor experience and investment.

CROSS-SECTORAL LINKAGES – FOOD AND DRINK

Tourism, right across Scotland, crucially links into our other key economic sectors. Food and drink is the most significant one – not only for activities and consumer spend during the duration of a visit, but also post-visit purchase and export earnings. On Thursday 23 March, the Food and Drink Industry announced their new strategy which will seek to build on the fantastic success, raise our collective ambition, and chart a path towards 2030 by identifying the key strands that will help the industry get there. The Food and Drink industry has set itself an ambition to double its value to £30 billion by 2030 and this is based on the trajectory of growth since 2010, coupled with the increased levels of support and focus that the new strategy will bring.

The strategy will also outline the priority areas to ensure the food and drink industry continues to be an important economic contributor to Scotland, and will highlight the importance of interdependence between food tourism, Scotland ‘the brand’ and the hospitality sector. It has been founded on a programme of significant research into consumer trends, market opportunities, and competitor analysis; and on the most extensive industry engagement process ever undertaken by Scotland Food and Drink, with over 400 businesses across the length and breadth of Scotland directly engaged.
MARKETING

MAJOR EVENTS
The Scottish Government, together with its agencies and bodies (including SportScotland) and with VisitScotland’s Events Directorate, EventScotland, playing a lead role, is strongly committed to supporting the further development of Scotland’s wide and diverse events portfolio and the events industry.

"Scotland the Perfect Stage" (launched on 15 September 2015) reaffirms our commitment to the delivery of a One Scotland approach to building a strong and dynamic events industry producing a portfolio of events and festivals that deliver sustainable impact and an international profile for Scotland. Not only are the events being delivered broad in nature but also in geography, spreading the benefits across Scotland. For example, this year we will host the Mountain Bike World Cup in Fort William (Highland Council), the Scottish Open in Dundonald (North Ayrshire), the Blair Castle International Horse Trials (Perth & Kinross), and the European Pipe Band Championships (Moray).

This is in addition to building on the legacy of the Commonwealth Games and Ryder Cup, with our investments (set out below) in major sporting events such as the 2018 European Championships, the 2019 Solheim Cup, the UEFA Euro 2020 Championships and both the Scottish Open and Ladies Scottish Open. During the term of this Parliament we will invest:

- up to £63 million on the 2018 European Championships
- up to £19 million on the 2019 Solheim Cup
- up to £3.5 million on the UEFA Euro 2020 Championships
- £1.7 million each year on the Scottish Open and Ladies Scottish Open

THEMED YEARS
The Themed Years programme has been successful in giving Scottish tourism an edge, galvanising partners to work together to promote Scotland and its people.

In 2017, Scotland is celebrating the Year of History, Heritage and Archaeology. 2018 will be the Year of Young People, a year aimed to inspire Scotland through its young people and celebrate their achievements.

I have just announced the future programme for the Themed Years up to 2022. This followed a consultation with the tourism industry and others to seek their views on the best way to continue the programme to optimum benefit. Organisations and individuals who participated in that conversation were in favour of continuing with Themed Years. More importantly, a significant majority found the programme to be beneficial to their business or organisation. We also listened to the views expressed that the programme would benefit from longer time scales and the Years will now be delivered in a two year cycle.

The Year of Scotland’s Coast and Waters will be celebrated in 2020 while the focus in 2022 will be the Year of Scotland’s Stories, both led by VisitScotland. The 2020 theme will support Scotland’s marine and coastal tourism sector, as well as the marine tourism strategy ‘Awakening the Giant’. Scotland’s Stories will be a showcase of the country’s rich literature, film, oral traditions and myths and legends during 2022.
**SCOTTISH GOVERNMENT TOURISM WORKING GROUP**
The creation of the Scottish Government high-level Tourism Working Group will support greater collaboration and drive a step-change in progress across the tourism agenda.

VisitScotland’s membership of the group will be key, using its partner experience to help us to explore ways in which we can accelerate economic growth within the tourism sector, building on the work of “STA Tourism Scotland 2020” and beyond.

**SOUTH OF SCOTLAND AS A TOURISM DESTINATION**
The Enterprise and Skills Review, announced by the First Minister in May 2016, is a key part of our aim to boost productivity, equality, wellbeing and sustainability. Phase One of the review included decisions focused on ensuring coherence and a simpler, more flexible and cost-effective system of national and local support.

We will continue to work to make all of Scotland a destination of first choice for visitors, domestic as well as from around the world. However, Phase One of the Enterprise and Skills Review also announced that Scottish Ministers would create a new vehicle to meet the enterprise and skills needs of the South of Scotland.

As part of the Phase Two implementation, Ministers committed to exploring how best to create the new vehicle to meet the needs of the South of Scotland, including clarifying its boundaries and the locally-based support it will deliver.

This will include, but is not limited to, the creation of the new vehicle to meet the needs of the South of Scotland and building the strongest possible links between our public bodies, businesses and communities to ensure its activities are aligned both with Scotland’s economic needs and its internationalisation agenda.

**DESTINATION DEVELOPMENT**
Whilst the EFRA inquiry is looking, inter alia, at the issue of “How well do agencies promote rural destinations across England?” it is essential to support our businesses in all aspects of their work, as well as marketing.

Scotland’s destinations, including our cities and towns, are key to the maximisation of our economic benefits. Destination Organisations can be described as the bridge between the national and international marketing activity for VisitScotland and individual businesses delivering the authentic experience for our visitors.

In that role Destination Organisations offer opportunities for public and private sectors to work together. It is important therefore that public partners takes the lead in supporting them in their attraction strategies, growing local capacity and improving access to markets, whilst maintaining alignment with the “STA Tourism Scotland 2020” strategy.
FUNDING AND FISCAL POLICIES

ROLE OF ENTERPRISE AGENCIES
Although with a more national focus, Scottish Enterprise (SE) and Highlands and Islands Enterprise (HIE) remain fully engaged in local economic development. SE / HIE work closely with local authorities across urban and rural Scotland to promote economic recovery and growth, particularly through the framework of Community Planning. A critical component of support is Business Gateway, the main support body for provision of advice and the pipeline of new businesses with which SE and HIE can establish account management.

- **Scottish Enterprise** provides a range of support for tourism businesses, including innovation support, design support funding, food and drink consultancy; financial readiness, tourism leadership and business improvement and Destination Funding. Scottish Enterprise also provides intensive one to one support to 114 tourism account managed companies.
- **Highlands and Islands Enterprise** account manages 100 tourism businesses and organisations, ensuring remote communities benefit at the same time as larger towns. Support is directed at those with most potential for growth.
- **VisitScotland’s** Growth Fund supports collaborative tourism marketing projects which focus on growth in the tourism sector and ensure that visitors experience the true Spirit of Scotland. The fund is a platform which supports groups in leveraging additional and focused marketing investment - stimulating collaboration within the industry and closer working with VisitScotland. This is in addition to free market intelligence and advice, available through the industry-facing website VisitScotland.org. VisitScotland also offers support to individual businesses through their Quality Assurance schemes, helping to ensure our visitors will have an excellent experience.

UK GOVERNMENT FISCAL POLICIES – COMPARATORS OF COMPETITIVENESS
As well as infrastructure and skills, price competitiveness is a key part of the tourism offering of every country. The contrast between the two is best shown in the World Economic Forum reports on Travel and Tourism Competitiveness. Whilst the overall UK rating is 5th out of 141 in the world, the aggregate score for Pillar 8 (“Price Competitiveness”) places the UK at 140th out of 141.

VAT RATES
Business rates and poundage are devolved to the Scottish Government. However, VAT rates are not and, of 28 European Union countries, 25 have some form of reduced tourism VAT: for example only Denmark and Slovakia have comparable or higher VAT rates on hotel accommodation than the UK - where the rate is currently 20 per cent.

Supporters of the Cut Tourism VAT Campaign believe that this puts the sector at a severe competitive disadvantage to operators in nearly every other Member State where reduced rates apply.

The Scottish Government values the significant contribution made by the visitor economy and is interested in better understanding the potential impact that a reduced rate
of VAT could have in bringing important benefits for the tourism sector, including enhancing its competitiveness.

In March 2016, following a joint Ministerial meeting, the former Minister for Tourism, along with those of the UK Government and the Devolved Administrations, wrote jointly to HM Treasury to request a review of VAT rates for the tourism industry to gather evidence on the impact of any change.

This approach was declined by UK HM Treasury.

**CONNECTIVITY**
Scotland’s airports are ambitious for growth and are competing with many airports on a global stage. International connectivity is vital to tourism and the Scottish Government, public agencies, airports and other parts of the private sector have all worked together to attract new air routes to Scotland.

Some notable successes in recent years which provide evidence of the effective partnership approach would include: Edinburgh’s new routes to the Middle East and North America; Glasgow’s new routes to North America and its first ever flights from South Korea; Aberdeen’s new flights to Iceland and Inverness’s new routes to Amsterdam and Heathrow.

Airlines have many choices of where to fly, both in Europe and further afield. Securing these new routes has been more challenging because Scotland was competing with countries with either lower air passenger taxes or no passenger taxes at all.

In our action to reduce the overall burden of Air Departure Tax by 50% by the end of the current Parliament and abolish the tax when resources allow, the Scottish Government is clear that this is not about displacement: rather than merely competing for passengers from other parts of the UK it is about competing on a global stage to secure airline capacity by incentivising new routes and more travel.

Now that powers over APD in Scotland are in the process of being devolved to the Scottish Parliament, the Scottish Government will design and structure Air Departure Tax in a way which boosts Scotland’s air connectivity and economic competitiveness, encouraging the establishment of new routes which will enhance business connectivity and tourism.

The Scottish Government is also keen to create an environment which encourages airlines to base more aircraft in Scotland, which not only creates new routes but creates new jobs, including flight crew, cabin crew, engineering and ancillary support roles. Our plans to reduce the tax burden helps ensure a more level playing field with many other airports competing to secure the same airlines and similar routes.

**MARINE AND COASTAL TOURISM**
Scotland’s varied coastal landscapes are internationally renowned and support a valuable recreation and tourism sector. Some of our most remote communities right across Scotland and our Islands in particular, already benefit greatly from recreational marine traffic, resulting in additional business, jobs and prosperity.
This is therefore recognised in Scotland’s first statutory National Marine Plan (NMP) which, as the title states provides “a Single Framework for Managing Our Seas.” The NMP specifically sets out marine planning policy to ensure that “Opportunities to promote sustainable development of marine recreation and tourism should be supported.”

Within the overarching STA Tourism Scotland 2020 Strategy, the Scottish tourism industry has highlighted the potential growth of Marine and Coastal tourism to be a key economic sector.

Recent updates of the original 2010 economic analysis of sailing tourism by Scottish Enterprise, confirmed the growth to date and potential for further expansion of the market. The Scottish Government sees huge potential in the development of the Marine and Coastal Tourism Sector and shares the enthusiasm of the tourism industry in what can be achieved.

A key element of the Marine Tourism Strategy is to ensure strong linkages between marine and coastal tourism to maximise the visitor offering and experience, and thereby increase the overall economic impact of the sector. By joining Coast and Waters together as the Themed Year for 2020, we are sending strong recognition of our current attractions and assets, together with a clear steer for the direction of future travel for all industry stakeholders.

Aligned to the need to encourage shared infrastructure development is a recognition that planning policies should encourage and support co-operation and sharing infrastructure and/or facilities amongst complementary tourism sectors where appropriate – together with examination of low carbon transport options.

Regional marine plans will identify areas that are of recreational and tourism value and identify where prospects for significant development exist, including opportunities to link to the National Long Distance Walking and Cycle Routes. This will lead to opportunities for establishing more localised and/or bespoke recreational opportunities and visitor attractions.

Recent work at community levels shows such promise. Encouraging modular development of shared infrastructure enables community groups (and the surrounding tourism and hospitality businesses) to not only (in some cases) attract for the first time bespoke expedition ships of around 800 passengers but also a more regular stream of smaller leisure vessels.

In addition, as part of our ongoing commitment to supporting the cruise industry in Scotland, the Scottish Government hosted a Cruise Summit between cruise operators, ports and coastal tourism stakeholders, in Edinburgh, on the 16 November. The aim was to bring together stakeholders to discuss supporting continued growth in the sector, identifying good practice in helping destinations develop their offering for the cruise sector and to highlight threats and opportunities for the cruise sector as whole.
In looking at the key markets from where much of Scotland’s international marine visitors currently come from, I would flag that our approach to marine and coastal tourism appears wholly aligned with the EU’s Blue Growth strategy.

**ADDRESSING SEASONALITY THROUGH INCLUSIVE TOURISM**

At the heart of seasonality is the need to encourage more people, both from the UK and abroad, to visit more of Scotland’s rural and remote rural places, for longer and at all times of the year.

The Scottish Government has been working with VisitScotland and other partners to highlight both the social and economic benefits inclusive tourism, in all its forms, can bring. In part, seeking to reduce the overall impact of seasonality by filling capacity during low or shoulder season months.

The benefits from such an approach can flow from supporting those who face barriers in enjoying all that Scotland has to offer – in terms of the health, wellbeing and self-efficacy of individuals and families - but also more widely in growing our visitor economy, addressing industry seasonality and highlighting career opportunities.

European partnership has also been a part of this success: VisitScotland has also been inspired greatly by the work of VisitFlanders on social tourism. VisitScotland has an information sharing agreement with VisitFlanders, which involves exchange of best practice and expertise on agreed topics, including social tourism. This bilateral partnership is very much valued and productive for both organisations.

**LOCAL ENVIRONMENT AND CHARACTER:**

**BALANCE VISITORS’ EXPERIENCES WITH ENVIRONMENT AND CHARACTER**

The experiences of our Island communities, such as Orkney, in dealing with cruise vessels are seen as a particular success story in balancing demand with sustaining their heritage and environment. This is a global issue in the cruise industry, and one we see elsewhere in our ‘Near Neighbours’, such as Iceland. The collaborative approach amongst destination stakeholders, rather than a top down approach, has been key.

We also see well-thought out action in the Loch Lomond and Trossachs National Park. New bye-laws are managing the pressures and damage caused by camping and fire lighting in less than four per cent of the National Park. Alongside this the National Park Authority has provided over 300 camping places in the byelaw zones bookable through a new easy to use website.

**INFRASTRUCTURE AND SKILLS**

**ROLE OF VISITSCOTLAND NATIONAL TOURISM DEVELOPMENT FRAMEWORK & SUPPORTING INFRASTRUCTURE**
The recent refresh of the VisitScotland National Tourism Development Framework is a good illustration of work to ensure that the development of Scotland’s tourism infrastructure is carried out in a strategic and collaborative way that involves all of our tourism stakeholders.

The VisitScotland National Tourism Development Framework refresh is aligned with, and supports, the STA Tourism Scotland 2020 strategy in order to support the aim of increasing sustainable economic growth in the visitor economy. This is also aligned to the planning system at the national level – Scottish Planning Policy and the National Planning Framework (3).

Running across all planning authorities in Scotland (the 32 local authorities and the two National Parks) the VisitScotland National Tourism Development Framework helps planning authorities (including strategic development planning authorities, local planning authorities and national park authorities) to develop their own strategies to grow the visitor economy in their local areas, aligned to the eight themes within the overarching STA Tourism Scotland 2020 strategy.

The delivery of development opportunities often requires multi-agency collaboration, intensive project management support and the adoption of a pro-active approach to secure the necessary investment. The VisitScotland National Tourism Development Framework is not in itself a specific commitment to expenditure by any local authority, Government agency or stakeholder. Instead it helps inform the investment programmes of public agencies and infrastructure providers, as well as shaping planning policy for the Scottish planning system to realise development opportunities to 2020 and beyond.

**DIGITAL TOURISM**

Digital was only mentioned three times in the original Scottish Tourism Alliance “Tourism Strategy 2020” when launched in 2012: the mid-term review in 2016 made it clear that digital has become the focus for the industry in Scotland. Increasing the percentage of businesses that are capable of online booking and other marketing activity is a shared priority.

Our agencies the Scottish Government and the industry are working together to move beyond current activity to support full digital immersion and connectivity for Scotland’s tourism industry. To deliver this, not only is the Scottish Government committed to delivering 100 per cent superfast broadband access by the end of 2021, we are developing proposals to address 4G mobile coverage gaps and are committed to ensuring SMEs make best use of digital technology.

Developing Scotland’s digital capacity in both skills and infrastructure is crucial to success. Through the Digital Scotland Business Excellence Partnership (DSBEP), we have made £7 million available to deliver a number of initiatives designed to help Scottish businesses increase their digital capability, and make the most of the rapidly changing and newly emerging digital technologies to improve their productivity and in turn boost Scotland’s economy.
One of these initiatives, Digital Tourism Scotland, is a partnership of seven organisations: Business Gateway, Scottish Government, Highlands and Islands Enterprise, Scottish Enterprise, Scottish Tourism Alliance, Skills Development Scotland, and VisitScotland. So far the partnership has delivered workshops and awareness sessions to 566 unique delegates and 452 unique businesses right across Scotland - all aimed at building digital skills and capabilities within all tourism businesses to drive growth and improve the overall visitor experience.

**TOURISM SKILLS INVESTMENT PLAN**

The industry-led STA Tourism Scotland 2020 strategy recognises that skilled and passionate people are key to delivering success. The future of tourism and hospitality starts at grass roots level and it is essential that young people have a chance to appreciate that the tourism and hospitality industry offers a career choice with huge potential for training, development and progression.

The Tourism Skills Investment Plan was developed in partnership between Skills Development Scotland and the Scottish Tourism Alliance. The Tourism Skills Investment Plan, first published in March 2013, has been refreshed and re-launched in September 2016 to support the mid-term review of the Tourism Scotland 2020 Strategy.

The Tourism Skills Investment Plan has a key priority to Raise the Attractiveness of the sector and attract talent into the sector. This focuses on 3 key actions:

(i) Establish school-tourism partnerships;
(ii) Embed tourism related learning into the school curriculum; and
(iii) Raise awareness of tourism careers to potential career change.

*March 2017*