Tourism Development Framework for Scotland
...role of the planning system in delivering the visitor economy

July 2013

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Ministerial Statement

As the Minister for Tourism, I am delighted to present and endorse the VisitScotland Tourism Development Framework for Scotland: *role of the planning system in delivering the Visitor Economy*.

Tourism is a most important industry in Scotland - its benefit reaching into many different sectors within the wider visitor economy. Sustainable growth in the visitor economy over the next few years is a vital objective and this Framework will provide a useful point of guidance to development planning authorities to help secure this essential growth.

It is critical that we all work together towards a common goal. The partnership formed between the publication of the national tourism strategy by The Scottish Tourism Alliance, *Tourism Scotland 2020,* and of this Framework encourages both the private and public sectors to work together to the credit of the visitor economy. We must all come together to make a positive contribution in the implementation process of this Framework and to evidence market demand in relation to the investment opportunities highlighted in the document.

On behalf of the Scottish Government I congratulate VisitScotland - which is working in partnership with other national and local stakeholders in both the public and private sectors - on the production of this Framework, and I look forward to working with everyone involved in its creation towards the realisation of the potential and ambition of Scotland's tourism industry.

Fergus Ewing
Minister for Energy, Enterprise and Tourism **July 2013**

Preface

The Tourism Development Framework for Scotland: *role of the planning system in delivering the Visitor Economy* (the Framework) has been prepared to assist and promote growth in Scotland's visitor economy to 2020. It supports the national tourism strategy (*Tourism Scotland 2020*) produced by the Tourism Leadership Group where our collective ambition is for Scotland to be recognised as a destination of first choice. It also supports the vision in the National Planning Framework in supporting sustainable economic growth and the transition to a low carbon economy.

VisitScotland, working in partnership with other national and local stakeholders in the public and private sector, will seek to grow and develop the sustainable economic benefit of tourism to Scotland's visitor economy.

This Framework sets out actions and provides guidance to help co-ordinate future development in the visitor economy. Through a greater focus on co-ordination, the actions proposed by the Framework will help secure added value from future investment in infrastructure and promote engagement with the development plan system to realise future opportunities.

The Framework is not the start of a new process. It builds on and continues to develop the ongoing partnership which Scottish Government and its agencies have had for some time with development planning authorities and the many other stakeholders working in the visitor economy at national and local level. This Framework should be considered by local authorities as they work with community planning partners to take forward their Single Outcome Agreements.

VisitScotland welcomes the inputs to date from those that have contributed to develop this Framework.

The visitor economy in Scotland supports many jobs across Scotland. For some, the visitor economy is a cornerstone of its local economy. Realising its growth potential to 2020 through the planning system is an important opportunity to grasp especially in our challenging economic climate.

This Framework sets out actions to support sustainable growth in the visitor economy to 2020.

It aligns with appropriate infrastructure and other relevant investment strategies across a range of public sector organisations and sets out future aspirations and ambitions of stakeholders working in the tourism sector for each development planning authority. These aspirations and ambitions are published in a separate Report (*Aspirations and Ambitions – our development opportunities*), and provide a range of opportunities to be considered in emerging and future development plans across Scotland.

The Framework's remit is to focus on development planning matters. Therefore it does not address other important operational matters in the sector such as service, skills, training or quality highlighted and being taken forward in parallel by industry in *Tourism Scotland 2020*.

This Framework is a starting point to facilitate more co-ordinated working and added value in the sector. It will be reviewed and updated on a three year cycle, reviewing progress made and allowing updates to take account of progress in growing the visitor economy.

More detailed work by VisitScotland in association with other stakeholders will follow using this Framework, leading to a series of *Action Plans for Development* for each development planning authority to help co-ordination at both the national and local level.

1.0 Introduction

1.1 Scotland is an exciting and vibrant country - an iconic destination that offers a dramatic and enduring visitor experience.

1.2 Scotland has tremendous tourism assets in our scenery and natural environment, our distinctive culture and heritage, the heritage of our towns and cities, and the opportunities it offers for a range of sports and leisure activities.

1.3 Tourism and the wider visitor economy is a vital industry for Scotland - benefiting our towns, cities and rural areas, and helping support infrastructure, transport services and leisure and cultural facilities that benefit the country as a whole. It contributes around £11bn (Deloitte 2010[1]) to the Scottish economy. This includes direct and indirect expenditure by both overnight and day visitors.

1.4 Scotland faces a challenge in meeting and moving to an agenda to secure sustainable economic growth. All participants working in Scottish tourism recognise the need for a step change in the way it both promotes and delivers growth. A co-ordinated and concerted focus on investing in the areas of greatest opportunity will continue to help drive growth to 2020.

1.5 In response to this challenge, VisitScotland has published this - the first Tourism Development Framework for Scotland…*role of the planning system in delivering the visitor economy* (the Framework). The Framework supports the national tourism strategy promoted on behalf of the industry by The Scottish Tourism Alliance – *Tourism Scotland 2020*, and the *Tourism, recreation and the visitor economy* element of the spatial strategy in the National Planning Framework.

Purpose of the Framework

1.6 This Framework has been prepared to support the aim of increasing sustainable economic growth in the visitor economy being promoted by the planning system at the national level – Scottish Planning Policy and the National Planning Framework – and help development 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.

1.7 The Framework presents a number of actions as a *Development Framework to 2020* for local and national stakeholders operating in the visitor economy to help grow the visitor economy. These actions are in response to the consultations received.

1.8 The Framework has collated the infrastructure and development opportunities provided in the consultation process. These opportunities are presented to development planning authorities in a separate report: *Ambitions and Aspirations – Our Development Opportunities* to be taken into consideration as part of their ongoing development plan processes.

1.9 The Framework recognises the need for greater focus on current partnership working between public and private sectors with VisitScotland supporting through an enabling role.

1.10 This Framework is not itself a specific commitment to expenditure by any local authority, Government agency or stakeholder. It will help 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.

[1] The economic contribution of the visitor economy: UK and the Nations, Deloitte and Oxford Economics for Visit Britain, June 2010.

Visitor Economy

1.11 The visitor economy is the term given to the interaction in economic terms between visitor spend and the services which contribute to and benefit from this in Scotland. It is one of the most significant parts of the wider Scottish economy and is important to enhancing Scotland's future economic well-being, especially in our rural areas.

1.12 Independently valued at around £11billion (Deloitte 2010[2]), it has at its core the tourism sector with its traditional areas of accommodation, activities, travel and attractions. This comprises in excess of £4.5bn in overnight visitors with day visitors contributing a further £6.2bn.

1.13 In the *Tourism Scotland 2020* strategy, the Tourism Leadership Group on behalf of the industry set a target of securing an annual visitor spend of between £5.5bn and £6.5bn to 2020 for overnight visitors – an increase of £1bn or more (at 2011 prices) over current performance. Support from the planning system is necessary to help deliver this target.

1.14 The visitor economy is constantly subject to research on a range of matters to identify trends, market demand, economic value and other matters. VisitScotland continues to monitor the demand in the market. It is recognised that there is a need for ongoing research on the supply side to inform future decision making. This could help define shortfalls in supply against market demand through gap analysis.

1.15 Further research on the value of the visitor economy for each development planning authority is needed as well as improved data on local tourism supply, demand and performance. Local authorities are already working with VisitScotland in developing a more robust research approach. As a result development planning authorities could set their own targets for growth in the visitor economy and contribute to the targets set by the *Tourism Scotland 2020* strategy.

ACTION

VisitScotland with other stakeholders will continue to co-ordinate research priorities to help provide key information for development planning authorities to support opportunities for growth in the visitor economy.

Delivering the Framework's Actions through Co-ordinating Relationships

1.16 There is a complex set of relationships between the organisations responsible for the delivery of the visitor economy in Scotland. The responsibility for the performance of the visitor economy lies across a range of organisations in both private and public sectors.

1.17 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. Developing the ongoing partnership between the private sector, Scottish Government, its agencies and Scotland's councils is at the heart of the Framework and builds on the local tourism partnerships around Scotland. Fostering collaboration is as the heart of the National Planning Framework.

Maximising the Value from Investment

1.18 The Framework has been produced in a challenging financial climate to secure investment from both public and private sectors.

1.19 There is limited funding available in the public sector from Scottish Government and local government budgets to stimulate investment in the visitor economy. Therefore, the Framework has adopted an

[2] Ibid.

enabling approach to maximise benefits through added focus and co-ordination in future decisions and investment strategies for infrastructure investment across the public sector.

1.20 We are seeking to increase awareness and value in existing investment to directly benefit the visitor economy. The enabling approach proposed by VisitScotland is set out in the final section of this Framework – *Making it Happen*. This approach will also be of benefit to the delivery of *Tourism Scotland 2020*.

1.21 Most of the investment to deliver upgrades to existing business or establishing new businesses in the visitor economy will come from the private sector and more often from smaller businesses in rural locations. To help facilitate private sector investment, innovative funding propositions may be required.

1.22 The consultation process confirmed that obtaining planning permission remains a critical matter to securing investment. The actions recommended in this Framework seek to build confidence in securing planning permission, and releasing private sector finance – especially in rural and island locations.

1.23 Development opportunities need to be approached in a different and distinct way for projects in rural and island locations. Dependency on a more limited seasonal market and need for greater business diversification are key issues for businesses serving the rural and island markets. This gives rise to different financial circumstances and particular challenges to support and secure viable business solutions.

1.24 Development in rural and island locations with potentially limited or more variable (seasonal) market demand therefore requires greater consideration of the economic and financial factors needed to support the business case during the planning determination process. Supporting enabling development, avoiding unnecessary upfront demands for infrastructure and introducing flexibility in how best to meet planning policy requirements can provide invaluable support to secure a viable business case.

1.25 At all times, understanding and supporting the specific needs and requirements of the business is at the core of realising the development opportunity irrespective of its location in an urban, rural or island location. It is critical that market demand evidence underpins development opportunities, irrespective of location.

Influencing the Planning System

1.26 A significant amount of work is already being carried out in the visitor economy by local authorities and other agencies, working in partnership and involving both public and private sectors. The Framework builds upon this on-going work and where possible, by securing a more co-ordinated approach, will harmonise future investment strategies in the public sector to create added value and will support the ambition to make Scotland a destination of first choice by 2020.

1.27 The consultation process and the views of 90 organisations and individuals in the visitor economy have informed this Framework. This included local authorities, leading agencies in the private sector along with Highlands and Islands Enterprise, Scottish Development International, Scottish Enterprise, Historic Scotland, Scottish Natural Heritage, Marine Scotland, Forestry Commission Scotland, Museums Galleries Scotland, Transport Scotland, the Regional Transport Partnerships and others.

1.28 A fundamental change in focus has now emerged to deliver potential growth in the visitor economy. The private sector, through The Scottish Tourism Alliance, has set its national strategy in its publication *Tourism Scotland 2020*. This Framework supports The Scottish Tourism Alliance to deliver parts of its national tourism strategy. The publication of *Tourism Scotland 2020* along with this Framework encourages partnership working to focus activities and define priorities in the visitor economy.

1.29 In terms of its relationship with *Tourism Scotland 2020*, this Framework focuses on the investment and development opportunities arising from two key parts of the strategy - *Improving the Customer Journey* and *Providing Authentic Experiences*. The wider strategy is being taken forward in parallel by the Scottish Tourism Alliance. The *Tourism Scotland 2020* strategy is set out in Diagram 1.

Diagram 1: Playing to Our Strengths
Source: *Tourism Scotland 2020*

1.30 This Framework therefore focuses on influencing future infrastructure investment and promoting development opportunities based on evidence of market demand, to help stimulate growth in the visitor economy with support from the development planning and development management system. It is supported by a range of development opportunities identified through its consultation process to realise the expansion of the visitor economy in the period up to 2020.

1.31 The Framework informs statutory development plans about potential development opportunities. It promotes the need for a supportive policy framework and it is to be used as a material consideration in the determination of planning applications for new and expanded facilities which form part of the visitor economy. It also provides assistance to local authorities as they work with community planning partners to take forward their Single Outcome Agreements.

1.32 Underlying the Framework is the support for the spatial strategy in The National Planning Framework to help make Scotland a low carbon place; a natural place to invest as well as being a successful, sustainable place which is well connected. It supports Scottish Government's aims for quality in design and place making in our environment.

1.33 Development plans which are attuned to the needs of the visitor economy are of particular significance in enabling Scotland to attract and secure further investment, whether it comes from an indigenous business or from an inward investor. The development framework for the visitor economy is set out in Chapter 2. It is presented by reference to the following elements in *Tourism Scotland 2020*'s strategy *Improving the Customer Journey* and *Providing Authentic Experiences*, focusing on the following themes:

Improving the Customer Journey

Theme 1 - Digital Connectivity
Theme 2 - Transport
Theme 3 - Accommodation
Theme 4 - Food & Drink

Providing Authentic Experiences

Theme 5 – Nature, Heritage & Activities
Theme 6 - Destination Towns & Cities
Theme 7 - Business Tourism
Theme 8 - Events & Festivals

1.34 These elements of the strategy are identified in *Tourism Scotland 2020* and form the core of the Development Framework. This strategy and their Themes is a useful appraisal tool for development planning authorities to use to formulate tourism development strategies in their development plans.

1.35 The visitor economy operates across a range of geographies and boundaries. The overall experience of our tourists and visitors is dependent on the quality of the overall customer journey. On-going working through an inter-authority perspective in partnership with stakeholders will help formulate development strategies in the visitor economy which avoid duplication and help set priorities.

1.36 The consultation process for this Framework highlighted the need for the development management process across Scotland to be more supportive to emerging tourism projects. Giving more weight to the sustainable economic factors in taking planning decisions is highlighted in this Framework.

1.37 In producing this Framework, the consultation process highlighted many ambitions and aspirations for the visitor economy. These have been collated and published separately in *Ambitions and Aspirations*: *Our Development Opportunities*. These opportunities will enable planning authorities to formulate development strategies and proposals at the local level and help influence future infrastructure investments through their development plans.

1.38 The Framework now provides a focus and reference point for all emerging and future development plans with an interest in the visitor economy. It sets out actions and opportunities for development and if supported in the development plan, it will help provide developers, investors, businesses and communities with greater certainty to realise their ambitions. This provides confidence to investors by helping minimise the planning risk.

Compliance with statutory requirements

1.39 The Framework has been subject to a screening for Strategic Environmental Assessment (SEA). SEA is targeted at plans, programmes and strategies with significant environmental effects. Confirmation has been received that a SEA is not required for this Framework.

2.0 Development Framework to 2020

Introduction

2.1 The industry led national tourism strategy, *Tourism Scotland 2020,* highlights the need to secure growth through turning Scotland's tourism assets into authentic experiences which cannot be easily replicated by Scotland's competitors.

2.2 This Framework has been specifically framed around the strategy set out in *Tourism Scotland 2020 - Improving the Customer Journey* and *Providing Authentic Experiences*. It places the customer at the heart of the development strategy. By highlighting actions, this Framework sets out how fostering collaboration in co-ordinating investment in infrastructure and highlighting potential development opportunities can help secure growth.

2.3 This Framework is based on the following two Themes:

Improving the Customer Journey

Theme 1 - Digital Connectivity
Theme 2 - Transport
Theme 3 - Accommodation
Theme 4 - Food & Drink

Providing Authentic Experiences

Theme 5 – Nature, Heritage & Activities
Theme 6 - Destination Towns & Cities
Theme 7 - Business Tourism
Theme 8 - Events & Festivals

2.4 The actions highlighted to address priorities across these Themes create the Framework to 2020.

Development Framework

2.5 This Framework is summarised in the Executive Summary: *Development Framework to 2020*. The Framework lists the actions necessary to encourage growth in the visitor economy. It supports the Scottish Government's Economic Strategy for increasing sustainable economic growth.

2.6 Connectivity is key to the visitor experience and helping to secure growth. Individuals will focus on their own geographic area or theme of interest – from a single location to an extensive journey across Scotland. Scotland's visitor economy is predominantly based on regional settings. To maximise benefits, any emerging spatial strategies by development planning authorities may need to extend beyond the local authority area and seek inter-authority and inter-agency co-operation and collaboration. *Tourism Scotland 2020* through its *Destination Towns and Cities* Theme is exploring this regional perspective.

2.7 Opportunities and proposals have been collated for all development planning authorities across Scotland and are presented in the separate report – *Ambitions and Aspirations: Our Development Opportunities*.

2.8 There is considerable scope for further sustainable development serving the visitor economy to be accommodated within our urban and rural environments, even in locations known to be sensitive for their heritage, environmental or cultural value. The question is about striking the appropriate balance between the benefits from sustainable economic growth and the suitability of the mitigation for any impacts arising. This balance can only be struck at the local level when all relevant information is available to the planning authority.

Improving the Customer Journey

2.9 *Tourism Scotland 2020* sets out a strategy to provide a consistently high quality of visitor experience at all points along the customer journey. This Framework highlights the following actions.

Theme 1 – Digital Connectivity

2.10 The quality of the customer journey is increasingly dependent on the availability of digital information. In most instances, the customer journey will start with website searches at the planning stage based at home.

2.11 The role of tour operators in providing information, choice and opportunities to the market is recognised as an important factor in the journey planning stage.

2.12 Information about destinations, accommodation availability, events, and attractions along the customer journey route is increasingly important for our visitors on the move within Scotland. The reliability of our broadband and mobile phone connectivity across Scotland is essential to support growth in the visitor economy.

2.13 Improvements to our digital infrastructure are necessary to support growth in the visitor economy as well as other economic sectors. *Scotland's Digital Future: Infrastructure Action Plan*[3] outlines the commitment to a world-class, future proofed infrastructure that will deliver digital connectivity across the whole of Scotland by 2020.

2.14 The Scottish Government's *Step Change* programme will extend the infrastructure needed to deliver next generation broadband to areas where the market will currently not go. Over £240 million of public funding is being made available which, when combined with commercial rollout, will deliver next generation broadband access to 85% of premises in Scotland by 2015 and around 95% by 2017. World-Class 2020 will deliver a longer term plan, developed in parallel, to ensure we have the right mechanisms, partnerships and commercial models in place to deliver world-class infrastructure in a sustainable way and in partnership with industry.

2.15 In turn, as the availability of digital infrastructure is progressed across Scotland, businesses in the visitor economy (especially smaller establishments) will have the opportunity to improve the marketing of their products and services.

ACTION
Working with the Scottish Government and key public and private stakeholders involved in the delivery of the Digital Scotland strategy, VisitScotland will seek to ensure that the needs of the tourism economy are effectively catered for in all action plans.

[3] Scotland's Digital Future: Infrastructure Action Plan, Scottish Government, January 2012.

Theme 2 - Transport

2.16 Transport plays a vitally important role in the tourism experience. The journey to, around and from Scotland is an integral part of the overall holiday experience. For the purposes of this Framework, this element of the customer journey has been subdivided into:

Theme 2A – travelling to Scotland; and
Theme 2B – travelling around Scotland

2.17 Accessibility is a key driver to attracting inbound visitors and distributing them from the main transport hubs to other locations around Scotland. An effective road and rail infrastructure with national and international connections by air and sea is essential.

2.18 The Strategic Transport Projects Review (STPR) sets the Scottish Government's transport investment priorities for the next 20 years. The STPR does not specifically include recommendations that are the responsibility of local authorities and Regional Transport Partnerships (RTPs) to develop and deliver. Ministers have identified 4 priorities from the 29 recommendations proposed by the STPR. These are the Forth Replacement Crossing; Edinburgh Glasgow Improvement Programme (EGIP); Highland Mainline Improvements; and Aberdeen to Inverness Rail Improvements – all of which will benefit the visitor economy.

2.19 Other recommendations arising from the STPR will be taken forward in line with the resources available from future spending reviews. Transport Scotland is currently undertaking preliminary works on STPR recommendations, including design works on the A96 between Aberdeen and Inverness and the design of extended dual carriageway sections on the A9 north of Dunkeld.

2.20 In line with Scottish Government strategy, the underlying aim of this Framework is to encourage travel by more sustainable modes of transport. Currently, the car is still the most popular method of travel for arrival and departure in the visitor economy. This is followed closely by air but with an increasing popularity of travel by rail. Cars, buses/coaches and trains are still the most popular methods by which visitors travel around Scotland.

2.21 Investment in transport infrastructure is guided by the National Transport Strategy's three strategic outcomes (Improved journey times and connections; Reduced emissions; and Improved quality, accessibility and affordability). Investment in current transport infrastructure supports the visitor economy such as:

- Edinburgh tram providing an onward connection for passengers using Edinburgh Airport;
- Borders rail link, connecting parts of central Borders to Edinburgh;
- Edinburgh-Glasgow Improvement Project;
- New Forth Bridge Crossing; and
- Upgrades to improve our popular scenic routes.

2.22 This Theme focuses on the main arrival gateways for the visitor economy at Scotland's airports, ports, train stations and improving the tourism value along key routes on the strategic road network, as well as tourist routes. References to cycling and walking along our growing path network are discussed in Theme 5 – Nature, Heritage & Activities.

Smart and Integrated Ticketing

2.23 Integrated ticketing at our key gateways across Scotland – airports, ports and cities – provides an opportunity to ensure our visitors can travel reliably, easily and comfortably around Scotland.

2.24 A Report has been prepared by PWC for Transport Scotland[4] to help advance Transport Scotland's policy towards smart and integrated ticketing in Scotland. The Report has set out the strategic vision for the roll out of a smart and integrated environment, as follows:

- Short-term (2011 – 2013) – Continuing with the roll-out of Smart technology in Strathclyde and the rest of Scotland;
- Medium-term (2013 – 2018) – Taking steps towards the integration of modes in Strathclyde; and
- Longer-term (2018 onwards) – further integration of Smart-enabled modes, beyond Strathclyde and progressing to other areas, leading to nationwide coverage

2.25 Providing a smart and integrated ticketing system across Scotland along with high quality travel information in a digital format is essential. Allowing people to travel across all public transport modes using just one ticket remains a priority. The introduction of rapid, safe and simple transport options from airports to business centres is increasingly beneficial in attracting major conferences and international investment.

2.26 The cross selling of smart and integrated travel ticketing options would increase the ease of purchase for visitors, support visitor dispersal and thus increase benefits for our rural areas. Integrated ticketing is particularly important for those councils with international or large domestic airports, ports and mainline train stations acting as gateways (arrival points) into Scotland.

ACTION
Working with Transport Scotland, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage the introduction of a smart and integrated ticketing system, initially at all gateways into Scotland, and then across Scotland.

Theme 2A Travelling to Scotland

Airports

2.27 Scotland's main international airports are an important gateway to Scotland and support the visitor economy as well as playing a strategic economic role in their regional economies.

2.28 The key requirement for our international airports is the need to maintain and secure new routes to key destinations across the aviation network. International connectivity and particularly long haul connectivity in the UK is dominated by Heathrow which offers the greatest number of onward connections and frequency of leader services. Scottish airports need to maintain their connectivity with Heathrow (and Gatwick) in order to meet customer demand along with expanding direct international links to other destinations as well as connections to other key European hub airports. *Tourism Scotland 2020* also identifies other markets that could be used to prioritise future routes and transport priorities.

2.29 Transport Scotland is committed to working with its partners to develop Scotland's aviation routes for key markets. Ultimately, the routes and schedules they wish to operate is a commercial matter for the airlines to decide and not one in which the Scottish Government can intervene. Scottish Government continues to support route development through direct engagement with airlines and the provision of market and route analysis on the potential of the Scottish market to sustain new direct international air services.

[4] Smart & Integrated Ticketing Report for Scotland, PWC, 18th March 2011.

2.30 Convenient and reliable surface access to and from our airports by a range of modes of transport is fundamental to their successful operation as well as enhancing sustainability. Glasgow Prestwick is Scotland's only rail connected airport. Individual transport solutions for each airport is needed with the aim of improving the modal share to public transport through improving services in all our airports and facilitating interchange at transport hubs.

2.31 The consultation process highlighted the UK visa regime and Air Passenger Duty (APD) as adversely impacting on future passenger numbers. Both of these matters are the remit of UK Government and Scottish Government continues to monitor matters.

ACTION
Working in partnership with airport operators, Transport Scotland (in association with the UK Department for Transport), SDI and other stakeholders, VisitScotland will encourage greater international connectivity at Scotland's airports.

Working in partnership with airport operators, Transport Scotland, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage a review of the accessibility of their transport interchanges to all modes of travel with the aim of improving sustainability of travel for onward journeys.

Railways

2.32 The tourism potential offered by high speed connections to England is recognised. The ambition is for a high speed rail link north to south, joining Scotland to the planned UK network. The High Speed Rail from London to Birmingham service is planned to begin service in 2026, with the Birmingham to Manchester/Leeds beginning in 2032. Transport Scotland is working with The Department for Transport to ensure that Scotland is part of the UK Government's strategy for High Speed Rail.

2.33 The 7 Regional Transport Partnerships (RTPs) have, in their Regional Transport Strategy Delivery Plans, identified regional and local priorities for transport interventions which support sustainable economic growth, including supporting tourism. These Delivery Plans incorporate national priorities identified in the STPR, including improvements to the Highland Main Line between Inverness – Perth (parallel to the A9 road improvements); rail enhancements between Aberdeen and the Central Belt; and extension of rail electrification beyond the Edinburgh-Glasgow Improvement Project (EGIP) scheme northwards through Perth to Inverness and Aberdeen.

2.34 Our mainline railway stations are important gateways to Scotland for our incoming visitors. The sleeper services to and from London are important tourist connections. Improved connectivity in rail links to Aberdeen and Inverness from the central belt continues to be a priority. Our mainline stations need to function as transport hubs in their own right and the ongoing upgrade of these stations is important in meeting this requirement.

ACTION
Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will encourage improvements to mainline stations to enhance the visitor experience and enable greater accessibility to all modes of travel.

Ports

2.35 Ports are important in relation to both providing access to Scotland for visitors, as well as in supporting the cruise liner and leisure craft sectors. Ports are run on a commercial basis and are expected to be self-funding.

2.36 Future areas of possible development need to continue to include collaboration on key national and international ferry routes. The ongoing need for a direct car ferry service to mainland Europe from Scotland continues to be highlighted as an important requirement.

2.37 Future requirements include support and improved access to and from ferry ports across Scotland as well as exploring the potential for the cruising market. The need for any infrastructure development to support the visitor economy should be considered in conjunction with other emerging investment requirements and upgrades to meet requirements such as offshore renewables.

ACTION
Working in partnership with Transport Scotland, port operators, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage improvements to ports to enhance the visitor experience and enable greater accessibility to all modes of travel.

Cruise Market

2.38 Cruise market is considered as part of the Transport Theme in this Framework because of the need to consider the onshore infrastructure necessary to provide a quality service to tourists and attract operators. The cruise market is a developing part of the Scottish tourism offering. Within this market, Scotland is seen as performing strongly in the premium end of the market.

2.39 However, a number of infrastructure and other factors are currently limiting the potential for further growth of the product within Scotland:

- *Capacity and limits ashore* – many rural attractions struggle to cope with the volume of passengers which would arrive en masse from a cruise ship;
- *Coaches* – in some locations, availability of coaches is a limiting factor on vessels over 2,000 passengers and in some cases 1,000 passengers. One tour operator exited the market for this reason finding the logistical challenges too great for the level of returns;
- *Visitor experience* – instances have been identified where the number of cruise passengers landed impairs their experience of the destination. For some parts of Scotland, the essence of the explorer type product is the remoteness and ability to experience the natural world; and
- *Local benefit* – Local businesses should be encouraged to understand the benefits of the Cruise Business and how best to benefit from its sporadic but valuable trade opportunities. Certain Cruise operators believe that Scotland is behind many countries in understanding the complete range of trade available from Cruise Tourism and crew visits.

2.40 To maximise the potential of this market, operations need to be at the premium end and there is a need to invest to address identified issues. Increasing the number of port calls leads to an increase in the shore excursion offerings and profile destinations. Planning and co-ordination between these cruise destinations is an essential part of developing this market. Further clarification is needed on the economic benefit of this market to Scotland and to identify the potential of this market. Previous research carried out into the Cruise market will be revisited to help provide the clarification required.

ACTION
Working in partnership with Cruise Scotland, a local and national stakeholder working group, including VisitScotland, will examine the future of the cruise market for Scotland and identify priorities for action to grow this market.

Theme 2B – travelling around Scotland

Air Services

2.41 Our internal domestic flights around Scotland are important to the social and economic welfare of the areas they serve especially air services in the Highlands and Islands. Barra's beach landing strip has been named as one of the world's most stunning airport approaches.

2.42 Highlands and Islands Airports Ltd (HIAL) is responsible for the operation and management of the airports in the Highlands and Islands and Dundee. These air services contribute to promoting sustainable economic growth in these areas including the visitor economy but are loss making and are supported by subsidies from the Scottish Government.

ACTION

Working in partnership with airport operators, national and local stakeholders, VisitScotland will consider measures to encourage take-up of air services by visitors.

Ferry Services

2.43 Ferries operating within Scotland are an essential part of Scotland's transport network. They perform several roles including contributing to the sustainability of our more remote communities through tourism. Our ferry services are a convenient way to see our stunning scenery and marine life and ferry travel is an important part of our transport network, for both residents and tourists alike. Our ports and harbours provide opportunities to act as gateways to our islands and peninsulas and develop business opportunities to serve the visitor economy. The visitor economy in the Outer Hebrides, Orkney and Shetland benefits from improved connectivity by sea.

2.44 Transport Scotland has now published the *Scottish Ferry Services: Ferries Plan (2013 - 2022)* which sets out the future of ferry services until 2022. Enhancing the take-up of Scotland's ferry services and related infrastructure are key to supporting business and employment opportunities generally as well as the visitor economy.

ACTION

Working in partnership with Ferry operators, Transport Scotland and other national and local stakeholders, VisitScotland will consider measures to encourage take-up of ferry services by visitors.

Railway Services

2.45 Scotland's rail network has 350 railway stations and over 2,700 kilometres of track. The rail network in the west of Scotland is the most heavily used commuter network in the UK outside London and caters for around 60% of passenger journeys made in Scotland. There are a number of current STPR priorities for rail enhancements as well as those referred to in paragraph 2.33[5]. The East Coast, West Coast and Cross-Country cross-border rail services are important for long distance, leisure and tourism travel.

2.46 Services in Scotland are provided by UK operators with connections into and within Scotland from England; ScotRail (the national operator); and regional operators. ScotRail operates 95% of all rail services in Scotland providing 2,400 services a day. Travel by rail is now a growing sector with over 83M journeys by rail. ScotRail is committed to the introduction of new technology on some its routes to 2015.

[5] http://www.transportscotland.gov.uk/strategy-and-research/publications-and-consultations/j11260a-00.htm

2.47 More than one third of ScotRail travel can be attributed to tourism (whether domestic or overseas) and some 25M to 30M passenger journeys are made on leisure trips. More than half of ScotRail's customers (52%) are defined as being short and long distance leisure trips.

2.48 Scotland's rural routes travel through some of the most iconic scenery in the world. The West Highland Line from Glasgow to Fort William and Mallaig is one of the top rail journeys in the world. Some of the rural routes can be further developed to enahnce their tourism value.

2.49 Upcoming network improvements include £650M Edinburgh-Glasgow Improvement Programme as well as the Borders railway (£350M) following on from new routes such as Glasgow-Edinburgh via Bathgate and Stirling – Alloa as well as new station openings. Services to tourist destinations such as Oban and Ayr are planned for enhancement as well new timetables providing additional services to boost connectivity and faster journey times.

2.50 Rail services also support major sporting and cultural events. As an example, sustainable travel options from ScotRail will be available for both the Commonwealth Games and Ryder Cup in 2014 as well as planned station upgrades.

2.51 Transport Scotland will invite bidders for the next ScotRail franchise in 2015 to make proposals which will further realise the tourism potential of our railways and how they can showcase Scotland.

ACTION
Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will consider measures to encourage take-up of rail services by visitors.

Road Improvements

2.52 Nearly one third of the 14.7M people who visit Scotland enjoy touring our country.

2.53 The A9 is Scotland's longest trunk road and passes through areas outstanding in wildlife and landscape terms, some of which are of national or international importance, in particular, the Cairngorms National Park - Britain's largest National Park. Transport Scotland considers the A9, A82, A83 and A75 as routes with a particular tourism focus. There are a number of sign-posted National Tourist Routes identified as an alternative choice to travelling on the trunk road network.

2.54 Transport Scotland, Regional Transport Partnerships and their partner councils are working together to deliver improvements to the strategic transport network. £2.5bn has been invested in road maintenance and operation since 2007 to facilitate economic growth including the visitor economy.

2.55 Continuing investment to maintain and improve our roads is essential and preparation is underway to take forward a number of schemes, either in the near future or when funding is available, which will enhance these key tourist routes such as:

- A9 – The £3bn project to dual the entire route between Perth and Inverness by 2025 which will improve access to tourist and recreation sites, to road safety, and to journey times and reliability.

- Aberdeen Western Peripheral Route - This £745m, 28 mile bypass will provide a fast link between towns in the north, south and west of Aberdeen, bringing significant benefits to local communities not just in the city of Aberdeen but to the whole of the North-east as well as the visitor economy.

- A82 – A £9.2m upgrade of the route at Loch Lomond's Pulpit Rock will commence in spring 2013 and improve traffic flow in the area; and work on a £15m Crianlarich bypass is about to start which will reduce congestion and noise within the village.

- A83 – Ministers are considering how best to bring forward a £40m package of works to improve the route at the Rest and Be Thankful, and between Tarbet and Kennacraig;

- A75 - Preparatory work is underway to enable delivery of the £25 million Dunragit Bypass and the £20m Hardgrove to Kinmount upgrade.

2.56 Other routes are prioritised for upgrading within the Strategic Transport Projects Review (STPR) such as the A90 at Dundee and the A96 between Aberdeen – Inverness.

2.57 With commitment to the upgrade of the A1 within England up to Berwick, there is a need to consider the benefits of improvements to cross border routes such as the A1 from Berwick to Dunbar. Other routes such as A93 Royal Deeside tourist route from Braemar to Perth, A87 Skye, A95 for the Speyside Whisky Trail, and A92 to Dundee are potential priorities for upgrade.

2.58 Upgrades to routes with tourism potential need to consider a wide range of factors to maximise benefit to the visitor economy including ease of connectivity (and signage) to tourist destinations; opportunities to incorporate vistas in route design and stopping places along the route to take advantage of scenic views. Scottish Transport Appraisal Guidance (STAG) appraises investment decisions but there is a further opportunity to take matters into account through Design Statements for route infrastructure improvements.

2.59 Councils along with the Regional Transport Partnerships and Transport Scotland are addressing the need for ongoing improvements required to the national, regional and local road network supporting the visitor economy. The designation of national tourist routes, along with the emerging scenic routes, improves accessibility and facilitates connectivity to the customer journey thereby adding value to the visitor economy.

ACTION
Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the prioritisation of interventions to improve connectivity along strategic visitor routes.

Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the development of a series of scenic tourist routes throughout Scotland.

Coach and bus services

2.60 Transport Scotland sets the national policy framework on buses which is delivered by bus operators, local authorities, Regional Transport Partnerships and the regulatory authorities. The majority of bus services in Scotland are operated on a commercial basis by private bus companies. Bus services to/from our gateways and transport hubs, as an integral part of urban public transport services and connections between our towns and villages, together with direct links to major visitor attractions, are essential in supporting the visitor economy. This sector plays an increasingly important role in sustainably transporting day visitors and tourists to attractions and destinations around Scotland.

2.61 Key to a successful journey is the need for the right infrastructure to allow passengers to be collected and disembark safely. Essential infrastructure for coach operators at a local scale is still needed for collection and disembarkation along with designated safe and secure layover parking in many of our tourist destinations.

ACTION

Working in partnership with development planning authorities, Councils, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage improvements for the operation of coach and bus services in recognised tourist destinations.

Theme 3 – Accommodation

2.62 This Theme includes accommodation requirements in both urban and rural areas and potential for further resort development. Accommodation is one of the main drivers of tourism revenue. Scotland's tourist accommodation supply, particularly at the higher end of the market, helps support the growth of the visitor economy.

2.63 The British Hospitality Association (BHA) has highlighted that there continues to be pipeline of new hotel development throughout Scotland amounting to around 3% of room-stock (room-stock estimated at circa 63,000 rooms). There is potential for a further 27% of room-stock on hold pending a more favourable investment and development climate. BHA considers that incentives such as including investing in hotels as a qualifying Enterprise Investment Scheme (EIS) and the re-introduction of capital allowances on hotel buildings would help stimulate investment in the hotel sector.

2.64 Ongoing investment in Scotland's tourist accommodation product from the private sector is therefore imperative to ensure that the product quality expectations of visitors are met going forward. Accepting the need for more, higher quality accommodation, and noting the constraints imposed by current economic conditions, the overall strategy also needs to incorporate 5 star quality experiences for the budget traveller without the need to stay in 4 – 5 star accommodation.

2.65 The analysis of visitors' wants and needs from VisitScotland's 2011/12 Visitor Survey highlights that, in particular, investment opportunities and requirements exist around:

- Improving the quality of existing accommodation which will help to drive up occupancy levels and provide higher yields for tourism businesses; and

- Investing in new accommodation provision from quality budget hotels to high end luxury resorts, which can attract new visitors to Scotland.

2.66 Aberdeen, Glasgow, and Edinburgh have seen significant levels of investment in new accommodation in recent years, with further commitments in the pipeline – many awaiting improving economic conditions.

2.67 There is still a requirement in Edinburgh, Glasgow and Aberdeen to provide further 4 and 5 star accommodation to support business tourism, in particular close to major conferences. Opportunities also exist for further investment in niche accommodation, including serviced apartments and new boutique hotels. These can meet the needs of the business traveller and provide for the short break international and affluent mature domestic market.

2.68 Additionally, Perth Concert Hall struggles to compete for events of scale as a result of the limited number of appropriate bed spaces within the city and surrounding area. The regeneration of Dundee Waterfront with the arrival of the V&A will bring new life to its downtown area and with it, increased demand for hotel accommodation.

2.69 Whilst the cities have seen a growth in new bedroom provision, rural locations and small towns have struggled to attract investment. This has been highlighted as a barrier to the future growth of tourism in these areas in the consultation responses. Consequently, it acts as a constraint on those expanding outdoor experiences, such as walking, mountain biking, wildlife watching and other niche markets which rely on the rural product.

2.70 Significant investment has been made in recent years on the west side of Loch Lomond in hotel accommodation, but further opportunities remain around the south of the Loch at the gateway to the National Park, as well as further north in the Cairngorms National Park.

2.71 Particular gaps have been highlighted in accommodation around such 'honey pot' locations as St Andrews, Fort William, Inverness, Oban, Ullapool, Skye, Outer Hebrides, Shetlands and Perthshire. These include hotels for groups and coach parties, independent country house hotels and high quality self catering developments. There is a need for a full network of hotels offering value and quality across Scotland which meet the needs of touring groups based on market demand.

2.72 The country house hotel, for so long a significant generator of short break tourism to Scotland is under pressure. It needs to evolve its experience to meet the changing needs of customers and move towards a more financially viable and hence sustainable business investment model.

2.73 Across Scotland, there is a need to consider the potential opportunities for future hotels close to existing visitor attractions. Some hotels may be conversions or redevelopment of existing buildings. Some may form part of an overall regeneration of an area. Where possible, proposals for new accommodation should form part of a wider mixed use development, maximising the opportunity for enabling development to cross fund the tourism project.

2.74 Holiday home and touring parks are important largely for the UK tourism market in terms of the volume of rural tourism bed spaces they provide and the economic benefits that flow from this scale of tourism activity. These parks may offer a range of accommodation, including static caravan holiday homes, low carbon holiday chalets and pitches for touring caravans, motor-homes, camping and other more novel accommodation as well as a diverse range of infrastructure and amenity provision. Many holiday and touring parks recognise the need to upgrade to improve quality to meet customer demands. Raising finance for this investment may require the need to expand the park to help support any upgrade.

2.75 Self-catering tourist accommodation in the countryside is by and large well provided for throughout Scotland with some gaps at the higher quality end of the market. This is often a lifestyle business which can provide the important personal touch for the authentic Scottish experience. This sector needs to continue to embrace digital communication as a means to connect with its market including mobile browsing.

ACTION

In partnership with local and national stakeholders, VisitScotland encourages development planning authorities to consider further accommodation requirements at locations where there is evidence of market demand including the upgrade or expansion of existing hotels. Other priorities include:

a. **Identifying locations for investment in new hotels in city centre locations around major conferences which will also support business tourism;**

b. **Identifying locations for investment in new hotel accommodation in towns and rural areas, including the country house hotel product; and**

c. **Setting policy to encourage investment in other forms of holiday accommodation in rural areas such as new self-catering accommodation (where deficiencies are identified), bunkhouse provision, holiday parks and novel low carbon development.**

Resort Development

2.76 Resorts are defined in this Framework as being destinations where a collection of activities, such as eating, sleeping and recreation, can be undertaken in one defined location. This location can be well defined by developments such as Gleneagles and Turnberry which are examples of long established Scottish resorts. Taymouth Castle and Archerfield are examples of recent and ongoing resort development which provide a complete visitor experience on site. Golf has been central to the development of the resort experience across Scotland and with its overall quality and history remains one of the core activities to attract visitors.

2.77 Resort development offers significant economic opportunities to Scotland as a result of the employment which they create, especially welcome in rural areas. The off-site spend and supply chain which they support and the nature of visitor which they attract is also important.

2.78 Resorts can be located in an urban or rural setting depending on the market being served. Resorts tend to depend on the quality of the surrounding environment for locational choice. However, in certain circumstances a resort has the potential to extend over a much wider area, sharing a common brand. Resorts can therefore generate tourism interest in the locality including attractions as well as supporting business tourism.

2.79 New resorts need to be sensitively and sustainably located to benefit the visitor economy and avoid damaging the character of the asset. Influencing factors to attract investment include aspects such as high quality scenic value, heritage value, image and customer awareness, a mix of markets and relatively easy access to international and domestic airports and to rail, road and ferry infrastructure.

2.80 Designations such as World Heritage Sites or National Nature Reserves are possible locations for resorts. Early dialogue informed by partnership working with all relevant stakeholders especially Scottish Natural Heritage and Historic Scotland is supported prior to considering allocating sites in the local development plan.

2.81 Opportunities for resorts will arise where appropriate estates or mansions come to the market. Forestry Commission Scotland and other estates may have opportunities to further develop forest tourism through the resort model. Scotland's existing resorts will benefit from ongoing development and expansion. This together with the promotion of the wider tourism resources in their locality needs to be explored and opportunities identified in the emerging development plans.

ACTION

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to identify search areas for urban and rural resorts in their development plans based on market demand.

Theme 4 – Food and Drink

2.82 It cannot be overstated how important food and drink is both to the financial health and wellbeing of Scottish tourism as well as to the visitor experience. The Food & Drink sector is fully acknowledged as a key part of the *Tourism Scotland 2020* strategy. Its quality and image is inextricably linked with our natural environment and heritage. In Scotland, current visitor spend on food and drink represents about 20% of all tourism expenditure, approximately £850M per annum.

2.83 Scotland's unique malt whisky heritage is internationally known and many of our distilleries have their own visitor centres, some themed along the established Malt Whisky Trail.

2.84 Delicacies such as haggis, Arbroath Smokies, Stornoway Black Pudding and many more represent examples of strong regional brands.

2.85 Official recognition of Scottish produce, for example through the EC *Protected Geographical Indication* status for the Arbroath Smokie, and annual accolades and awards obtained for our food and drink, are excellent for enhancing their international reputation and increasing awareness.

2.86 Our produce has enabled a speciality retail market to be developed across Scotland located in our popular tourist destinations There is scope to continue to further develop speciality retailing as part of the infrastructure of the visitor economy.

2.87 Visitor research by VisitScotland in 2011/12 highlights that, along with accommodation, visitors felt that improvement of the quality of their food experience in Scotland improves their overall visitor experience. The importance of food as part of the visitor experience will continue to grow in significance as visitors are exposed to a greater variety of high quality produce.

2.88 Eating locally distinctive food, experiencing new and exciting flavours and having easy access to a choice of catering – while providing good value for money, are essential components of a memorable tourism experience.

2.89 The ongoing promotion of festivals promoting local produce and drinks continue to gain in popularity along with more local events such as farmers markets. Investment in public realm infrastructure is important in creating an attractive environment for such markets to flourish, or for existing or new food and drink retail outlets to present their produce.

2.90 Many areas across Scotland will find it difficult to affect a growth step change if they do not develop and support quality catering outlets, at all pricing levels, that provide visitors with the type of product and experience which research shows is so important. Investment in local or regional quality catering provision particularly in Scotland's conference, exhibitions and events sectors is also vital to the ongoing growth and support of this sector.

2.91 The quality of the surrounding public realm is important for restaurants, cafes and bars to provide the right setting for the enjoyment of the produce on offer.

ACTION
Working with established local food forums and Scotland's food and drink sector, VisitScotland will continue to promote the importance that Scotland's produce contributes to the unique cultural experience for our visitors. Its local representation and identity should be an integral part of future tourism development strategies at the local level including any supporting infrastructure.

Providing Authentic Experiences

2.92 Following on from the choice of transport to the destination and choosing a place to stay, *Providing Authentic Experiences* considers the range of things to see, do and experience within and around the chosen location. This includes the improvement of existing visitor attractions and the overall improvement of the visitor experience along with new opportunities. Some key characteristics are evident from the customer analysis which Scotland's attraction and activities products require to meet. These include a need:

- To present and interpret Scotland's heritage, culture and landscape;
- To be innovative, offer quality and take advantage of Scotland's local products, not only in food and drink but also in other areas; and
- For recognition of the importance of the landscape, scenery and natural environment and its accessibility to visitors, whether for gentle or more adventurous pastimes – all of which promote a more healthy lifestyle.

2.93 Our outdoor activities appeal across a wide age range but Scotland offers a diverse range of activities for the youth travel market. North and western Scotland and its islands provide some of the great wilderness areas of Europe with potential to promote a diversity of outdoor pursuits especially for youth and education opportunities. The protection of these wilderness areas is recognised in the National Planning Framework.

2.94 Themed events and festivals increasingly play an important part in encouraging visitors and tourists to come to Scotland. With support from EventScotland, Scotland offers a full range of festivals and events throughout the year. Festivals and events are essential to extending the tourism season and attracting visitors to particular locations in Scotland. Securing an all year round offering to visitors whether leisure or business at key locations around Scotland remains important and the programming of festivals, and events aimed at national and international markets as well as regional markets is key to stimulating market demand.

Improving Visitor Attractions and Experience

2.95 Much work has already taken place to develop opportunities. New and continued investment can maintain and increase the momentum and enhance the attractiveness of Scotland's key market opportunities. This equally applies to the presentation of our cultural heritage in our museums and galleries as well as our public realm across our cities, towns and villages especially by our councils. It is acknowledged that maintaining funding for visitor attractions and museums will be a challenge in an era of competing priorities for public investment

2.96 There are opportunities for the heritage tourism sector to increase its value to the visitor economy and seek to increase revenues from their attractions – leading to greater investment in their respective assets. Given the significance of Scotland's history and heritage as a major attraction for tourists, it is important that levels of investment are maintained by those responsible for the restoration, refurbishment and maintenance of Scotland's historic built environment at a national and local level.

2.97 In addition to investing in the core asset or attraction, it is also important to ensure that supporting aspects which are very important to the customer journey also reflect the overall quality which our visitors experience. This includes catering, retail and hospitality outlets as well as elements such as signage, access and interpretation. Factoring in tourism and visitor facilities where necessary along with supporting infrastructure should be an integral part of proposals for the regeneration and expansion of villages, towns or cities where the visitor experience can be improved.

ACTION
Development planning authorities, in conjunction with other local and national stakeholders, are invited by VisitScotland to consider the requirements for the visitor experience in tourist destinations when allocating new development sites and identifying proposals in local development plans.

2.98 Scotland's assets are considered in terms of the following:

Theme 5 – Nature, Heritage & Activities
Theme 6 - Destination Towns & Cities
Theme 7 - Business Tourism
Theme 8 - Events & Festivals

2.99 These topics present an opportunity for the integrated development of spatial growth strategies for the visitor economy – adopting models of spatial planning such as 'core and cluster' or 'growth corridors' around these topics, individually or in combination. There are considerable opportunities to develop informed and integrated development strategies at the regional scale across Scotland as well as at the local level.

Theme 5 – Nature, Heritage & Activities

2.100 Scotland boasts some of the best countryside in the world. Scotland's nature and landscapes are highly valued assets – important to our communities and those who visit Scotland. VisitScotland's surveys confirm that it is the most important factor in attracting our visitors.

2.101 Many of Scotland's landscapes are protected by a diverse range of natural heritage designations such as National Nature Reserves; National Scenic Areas as well as local places such as Regional Parks and Local Nature Reserves. The overall aim to support growth in the visitor economy is to provide greater access to these special places. Securing appropriate development opportunities within these special places must demonstrate that any change maintains their special characteristics.

2.102 Scotland has world class access legislation which provides for public access to most land and water. These access rights are highly valued by visitors and tourists and the right of access creates assets for the visitor economy. Because these assets are freely available, there is recognition that their ongoing maintenance and upkeep will be more dependent on public support.

Scotland's paths and trails

2.103 Scotland has a wonderful and diverse range of paths and trails to be enjoyed by walkers and cyclists including Scotland's Great Trails; the National Cycle Network; local path networks and core paths; and hill tracks and rights of way.

2.104 Scotland's Great Trails currently offers 26 different long distance routes, providing over 1,700 miles of well managed paths through our countryside. As well as our local path networks through and around our cities and towns, there is now a network of core paths across Scotland promoted by councils and national park authorities. There are over 7,000 rights of way in Scotland recorded by Scotways (Scottish Rights of Way and Access Society).

2.105 Significant investment has been made in a range of multi-purpose routes. These provide access to the countryside for walkers and cyclists and allow visitors to enjoy a wide array of activities and pastimes. It is important to note the significant work of Scottish Natural Heritage, Forestry Commission Scotland, local authorities, National Park Authorities, the Cycle Tourism Forum and Scottish Canals in developing access and related facilities to our countryside including hills, mountains, coastlines, waterways and historic gardens and designed landscapes.

2.106 All of these trails and paths provide an extensive network of key routes for recreation and active travel across Scotland. Many are within easy reach of our existing cities, towns and villages, serving both residents and visitors, encouraging more off-road journeys, on foot, by bike, horseback or on water.

2.107 Many routes have been developed at a local level, providing core paths and routes which are particularly important in extending the visitor experience and visitor stay within towns. Investment has also been made in developing and maintaining nationally and regionally important routes such as the West Highland Way as well as providing effective route signage and accessible information on the internet. The scale of our path network is now an opportunity to further develop themes such as pilgrimage routes and other heritage trails.

2.108 Forestry Commission Scotland (FCS) manages around 1,200km of marked multiuse trails and 1,300km of cycling/mountain bike trails. FCS continues to develop its path and trail network on its substantial land holdings across Scotland with wider benefits for the development and contribution to the visitor economy. Further reference to the use of these paths and trails is made in Scotland's Outdoor Activities (paragraphs 2.141 to 2.161 of the Framework).

2.109 The extent and coverage of the path, trail and route network allows supporting infrastructure to follow. Such investments take the basic asset of our natural environment and provide means to access the outdoors in a more sustainable way and create opportunities to establish business ventures. These provide opportunities for longer stays to be built around our countryside offering.

ACTION

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the development opportunities along our designated path network to enhance their tourism potential.

Forest Tourism

2.110 Forest tourism overall is worth over £200M to the Scottish economy, supporting circa 18,000 jobs. Over 9 million visitors annually come to Scotland's national forest estate.

2.111 Scotland's forests and woodlands extend to 1.5M hectares of land. Of this 640,000ha make up the national forest estate managed by Forestry Commission Scotland of which 480,000ha is wooded. Many businesses, organisations and individuals manage our woodland and there are opportunities to invest in upgrades or new facilities. Forest tourism supports many activities and motorsports, orienteering, mountain biking, dog sports, triathlons, and festivals are some of the events held in Scotland's forests and woodlands.

2.112 Some forest landscapes are iconic and deliver cultural and natural heritage experiences:

- Glen Affric - often called Scotland's most scenic glen;
- Loch Katrine - inspiration for The Lady of the Lake;
- Perthshire Big Tree Country - the gateway to the Highlands;
- Queens View - a truly majestic panorama;
- Galloway Forest Dark Sky Park which is designated as the UK's only Dark Sky Park and forms part of UNESCO's Biosphere Reserve at Galloway and South Ayrshire;
- Glenmore and Rothiemurchus - home to ancient pines, an award winning beach and amazing mountains; and
- Southern Scotland - a modern mountain biking icon.

2.113 Forestry Commission Scotland has 6 Forest Parks and many visitor sites within its portfolio. The Forest Parks are the flagship visitor sites. £8.5M was invested in Glentress Peel in the Tweed Valley Forest Park, £4.5 million redevelopment in Galloway Forest Park and £2M investment at Queen Elizabeth Forest Park.

2.114 Other land managers involved in forest tourism include the National Trust for Scotland, Scottish Natural Heritage, RSPB Scotland, Scottish Wildlife Trust, and many other large estates as well as councils across Scotland. Development opportunities are being progressed in these estates to expand and diversify their businesses.

2.115 A number of development opportunities are being explored across the FCS estate. Glentress Peel, in Tweed Valley Forest Park, is being masterplanned to establish its future development potential. Leanachan (by Fort William) is already allocated in the development plan for tourism development. Feasibility work carried out in collaboration between SDI, SE, HIE and FCS indicates that locations such as Tweed Valley and Leanachan may be suitable for international resort-type developments. There may be other locations within the Scottish forests where a similar collaboration could take place.

2.116 FCS has substantial landholding in the following areas where there may be development opportunities for future tourism developments - East Aberdeenshire; Cairngorms National Park; Loch Lomond & Trossachs National Park; The Great Glen; Fife; Argyll; Tweed Valley; Lochabar; Highland Perthshire; and Dumfries & Galloway.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to examine the tourism potential from our forests and woodlands and consider the allocation of development opportunities in suitable areas in local development plans.

Scotland's Marine Environment

2.117 Scotland's marine leisure industry is currently estimated to be worth approximately £250M per annum, with the west coast of Scotland widely acknowledged to have some of Europe's best sailing. Marine Scotland is responsible for the sustainable management of our marine environment around the Scottish coast and a National Marine Plan will support the sustainable development of Scotland's seas. Scottish Canals is responsible for the management of the Caledonian, Crinan, Forth & Clyde, Union and Monkland Canals. The British Marine Federation Scotland (BMF Scotland) represents the interests and development of the boating sector of the marine leisure industry in Scotland.

2.118 Leisure and recreation interests are made up of a number of sub-sectors. The coastal tourism sector takes advantage of historic castles, picturesque fishing villages, craft businesses, marinas, sailing tuition, boat tours, fishing on lochs and open water, active boating and diving and links golf courses. In recent years, a thriving wildlife tourism industry has established itself in areas around Scotland, allowing visitors to experience whales, dolphins, and porpoises, seabirds and dramatic coastal scenery.

2.119 Scotland is marketed around the world as a destination for marine leisure and recreation pursuits, with resulting visitors bringing substantial revenue with them. However, the value of an award-winning beach (Blue Flag or Seaside Award) to a local economy is important in terms of attracting visitors, tourists or encouraging the local population to enjoy what's on their doorstep.

2.120 There is little standardised information on participation in marine leisure activities in Scotland, although individual sports and sectors gather data for their own purposes. Uniform robust national statistics require to be collected on an on-going basis to measure market size and growth. BMF Scotland's aggregated estimation of participation within Scotland for both visitors and residents confirms that the most five popular activities for the period 2010-2012 are:

Total participation (510,000)

- Canoeing (222,000);
- Small Sail Boat Activities (93,000);
- Motor Boating/Cruising (84,000);
- Yacht Cruising (55,000)
- Personal Watercraft (33,000).

2.121 Marine recreational activity is widely distributed around Scotland. The Firth of Clyde and the West Coast are world renowned for their sailing conditions, offering opportunities for day sailing, racing and cruising in relatively sheltered waters within spectacular scenery. The provision of associated facilities, such as marinas, boatyards and moorings at convenient intervals adds to the attraction of this area and there is still has much potential for development if it is to provide world class facilities and sufficient safe havens to increase the cruising market.

2.122 Recreational sea angling retains a Scotland-wide profile but the numbers actively participating vary reflecting the major centres of population. The greatest numbers of sea anglers are based in the central belt but often have to travel some distance to participate in their sport. Dumfries and Galloway, the west coast in Argyll and the north east coast are all hot-spots of sea angling activity, attracting participants from well beyond these areas.

2.123 Niche markets include sea kayaking in the Outer Hebrides, paddle-sports in the Great Glen, surfing and kite surfing on the north east coast, and windsurfing in Tiree, and Machrihanish.

2.124 The Orkney Islands attracts divers from all over the world to explore the remains of the scuttled German High Seas Fleet. Diving also occurs around St. Abbs Head and Eyemouth, in various sea lochs off the west coast and in the Sound of Mull, with growing interest in Argyll, the Moray Firth and north-west Scotland.

2.125 Extreme conditions are generated on the western seaboard and north coast and attract surfers, especially in areas that support surfing events such as Thurso. Surfing including kite surfing is also commonly pursued along the south east coast, from Edinburgh down to Coldingham Bay. Kite surfing is becoming more evident through Scotland on its windier beaches and in particular on the Moray Firth and Clyde.

2.126 Canoeing and kayaking are popular in coastal areas. Since access is the primary requisite, shoreside facilities are less important for this sport than for some others.

2.127 Marine wildlife watching is emerging as a significant sector within the wider tourism industry. Cetacean watching in the Moray Firth and down the east coast has grown significantly and continues to develop along the west coast. Along the Scottish coastline, bird watching continues as a major element of local tourism as highlighted by the Scottish Sea Bird Centre at North Berwick.

2.128 In many cases, it is the capacity of the hinterland to support a proposed development which is more relevant than the ability of the marine environment to accommodate the uses required of it. Investment has taken place recently in major infrastructure projects in Stranraer, Rothesay, Ardrossan and the upper Clyde, and new moorings have been constructed in Largs, the Cumbraes and throughout Argyll and the islands.

2.129 On the Clyde alone, some 30% of the boats are not Scottish owned. This is a 50% increase since 1996. This figure is likely to continue to increase as the demand for berths in England, Ireland and Wales now significantly exceeds supply. It is also perceived that Scotland, and the Clyde in particular, offers better sailing with cheaper and more available berthing than in the rest of the UK.

2.130 There are over 60 marinas across Scotland on coastal and inland waters. In the Clyde, there are currently over 2,700 pontoon berths and 2,000 moorings with a further 1,000 berths currently being planned or developed. Marina operators consider that even this may not be enough and that the number of pontoon berths may have to double in the next 10 years to meet demand. Further north, recent investment in the new marina facilities at Inverness has seen many of the new berths being taken up by boat owners from outwith Scotland, further illustrating the expanding market demand.

2.131 There is also the potential with improved marina facilities and berths to highlight Scotland as a potential destination for long distance cruisers (those sailing from the south coast of England and further afield) and even superyachts. According to BMF Scotland, the superyacht market is spreading over a wider geographic area and is no longer based mainly in the Mediterranean and Caribbean. The requirements of this market are demanding, but Scotland has potential to attract more superyachts to its harbours and ports. This market's development requires an integrated marketing regime if it is to break into this market, possibly even partnering with Scandinavia.

2.132 Continued expansion of the sailing product is constrained by the lack of berthing both at many marinas and favoured destinations, including Inverness, Inverclyde and North and South Ayrshire. There continues to be the opportunity to integrate accommodation at marinas to the wider tourism market such as at the James Watt Dock Marina and the new marina at Arrochar. Expansion in this sector is necessary in order for growth to be achieved, and with it the wider benefits to Scotland's economy on both the western and eastern coasts.

2.133 Given the average cruising distance of 25 miles per day, there remains the opportunity to develop the total marine tourism potential around the Scottish coast at existing harbours or new focal nodes as a series of 'stepping stones' around Scotland. Appropriate locations for marine tourism and its support services need to be sited where the opportunity arises and are well connected by road such as Oban Bay or in the Forth.

2.134 Marine Scotland's National Marine Plan will set out strategic policies for the sustainable use and development of Scotland's seas out to 200 nautical miles. Marine planning will also be implemented at a local level within 11 Scottish Marine regions around the coast of Scotland, from the Solway around to the Forth. Marine planning policies will support the growth of the marine recreation and tourism sector, including the protection and provision of facilities and access to the marine area.

2.135 Marine Scotland has identified a number of key activities which offer significant economic activity which can be facilitated by marine planning including sailing; sporting events; heritage tourism; kayaking; diving; surfing; kite sports; personal watercraft; recreational sea angling; wildlife watching; coastal walking and the cruise industry.

2.136 BMF Scotland highlights the requirement for an integrated approach for the development of the Scottish marine tourism product as many existing marine business are small and disparate and require a centralised approach to identifying opportunities for growth and information how to realise these. It is noted by operators within the marine leisure sector that there still is a need to understand the potential of marine leisure tourism and harness its economic benefits for coastal communities.

2.137 VisitScotland, Marine Scotland, BMF Scotland, together with other local and national stakeholders, will need to continue to collaborate to ensure that visitor economy potential is realised on appropriate marine environments supported by onshore infrastructure and facilities with priorities needed to be identified. Developments at historic harbours and quays need to be encouraged where it can help regenerate marine infrastructure. Support for the expansion of events around Scotland will play an important role in promoting marine tourism internationally.

ACTION
Working in partnership with Marine Scotland, BMF Scotland, and other local and national stakeholders, VisitScotland encourages development planning authorities to examine the tourism potential around our coasts and seas and consider the promotion of marine based development strategies along with the allocation of suitable areas for future development in local development plans.

Scotland's Canals

2.138 Scottish Canals is responsible for the management of the Caledonian, Crinan, Forth & Clyde, Union and Monkland Canals. Working in partnerships with stakeholders and local communities, Scottish

Canals is planning ventures with the private sector and other investors to deliver proposals within what is unquestionably some of Scotland's most exciting and scenic areas.

2.139 Its development strategy is based on creating destinations in key locations across Scotland including major city centres e.g. the new canal quarter at Edinburgh Quay, major regeneration projects such as The Falkirk Wheel and The Helix as well as developments at Highland tourist locations. The Highland Canoe Trail, Lowland Canoe Trail, initiatives with rowing clubs and the development of a major canoeing facility at Pinkston Basin in the heart of Glasgow will see these sports and related tourism expand.

2.140 More marinas are planned for the Canals together with an expansion of towpath tourism and better holiday accommodation. Opportunities include commercial, residential, leisure and water based schemes ranging from small developments to major regeneration projects.

ACTION
Working in partnership with Scottish Canals and other local and national stakeholders, VisitScotland encourages development planning authorities to continue to promote the tourism potential of our canals and waterways and consider the allocation of suitable sites in local development plans.

Scotland's Outdoor Activities

2.141 Scotland offers a diverse range of outdoor activities and the range and choice continues to grow. Some of our outdoor activities now enjoy international as well as national standing such as golf and mountain biking.

Snow Sports

2.142 Skiing and snowboarding have long been popular in the Highlands at Cairngorm Mountain, Nevis Range, Glencoe Mountain, Glenshee and Lecht, and are core to our outdoor activities and experiences in Scotland.

2.143 Snow sports have helped establish vibrant centres which now support a greater range of activities outwith the snow season. This is a good example of a flexible development model which establishes a core location for the outdoor activity, and creates a base for other outdoor activities to co-locate to maximise demand and extend the season.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the upgrade of supporting infrastructure at snow resorts where it meets the wider tourism market.

Golf

2.144 Golf is worth £220M to the visitor economy according to *the Scottish Golf Tourism Market Analysis 2009.* The visitor analysis shows that golf is an important attractor for visitors with Scotland being seen as the *Home of Golf*. This strong positioning of the golf product on the international events circuit as well as a location for the regular hosting of the Open Championship and as a venue for the 2014 Ryder Cup provides Scotland with an internationally competitive asset. The promotion of this asset continues to act as an important component of future growth. The golf product in Scotland has a number of particular strengths which form the basis for future investment and growth of the sector.

2.145 There are currently over 500 golf courses in Scotland, many with international appeal. Many contribute to a supporting element of the overall golf experience, offering an authentic Scottish golf experience away from the well known venues. Additionally, customer analysis suggests that Scotland represents value for money compared to some destinations, such as Ireland and Portugal.

2.146 Building on the positioning as the *Home of Golf*, Scotland has the potential with the right investment to compete internationally, offering a very high quality experience in the recognised golf destinations such as St Andrews, Aberdeenshire, Ayrshire including Arran, Angus and East Lothian, as well as growing interest in parts of the Highlands and the Islands.

2.147 Golf can be central to the wider resort experience, helping secure investment in 4 and 5 star hotel accommodation, as well as a range of other accommodation options highlighted in this Framework.

ACTION

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the upgrade of infrastructure at existing golf courses where it meets the wider tourism market supported by appropriate enabling development as required.

Leisure Cycling and Mountain Biking

2.148 The leisure cycling market in Scotland is estimated to be worth £122M to £243M per annum. The National Cycle Network in Scotland is co-ordinated by Sustrans but a significant proportion of the network is maintained by councils. Across Scotland, there are 2,100 miles of the National Cycle Network, including over 500 miles of traffic-free walking and cycling routes. Many of these routes have the potential to be linked into other tourism initiatives, maximising business opportunities.

2.149 To support this growing market, cycling routes continue to be developed such as the Hebridean Way, Oban to Fort William, Scottish Borders and Highland Perthshire. Cycling events continue to expand such as *Etape Caledonia*, *Tweedlove* and *Tour o' the Borders*. Route information continues to be developed and publicised to grow the market.

2.150 Along the National Cycling Network, cyclists need specialist support facilities from accommodation providers such as secure bike storage, drying rooms and bike washing and as part of their journey, ease of access to take bicycles onto trains and buses.

2.151 Scotland is recognised as a world class venue for mountain biking. The investments which have been made in mountain biking infrastructure in recent years provide an example of where Scotland can now compete internationally and attract markets which previously would not have considered Scotland. Mountain biking is worth around £120M annually to the visitor economy. In addition to the activities offered by mountain bike centres, there are hundreds of kilometres of way marked trails and the Scottish Outdoor Access Code allows responsible users to explore almost every part of the country.

2.152 A National Strategic Framework (*The Sustainable Development of Mountain Biking in Scotland 2009*) has been produced by a number of agencies with an interest in mountain biking including COSLA, Cycling Scotland, the Cyclists Touring Club, Event Scotland, Forestry Commission Scotland, HIE, International Mountain Biking Association UK, Scottish Cycling, SE, SNH, **sport**scotland and VisitScotland.

2.153 This Strategic Framework is seeking to create a series of local mountain bike development clusters and 7stanes is an example of a development cluster. These development clusters will be broad geographic areas with greatest potential to safeguard and improve existing provision and identify opportunities which deliver future needs at an optimum economic return in terms of visitor numbers.

2.154 Five development clusters are proposed and cover the following areas:

- South of Scotland
- West Central Scotland
- Perthshire/ Angus/ Fife
- The Highlands
- The North East and Deeside

2.155 These clusters are to be established progressively over a period of time. Further potential exists to support both the international appeal of Scotland to the mountain biking community. As well as continued investment in track provision and maintenance, there are investment opportunities around supporting infrastructure such as visitor centres, specialist retail, catering and accommodation.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of cycling infrastructure facilities to meet the wider tourism market supported by appropriate enabling development as required.

Country Sports Tourism

2.156 The country and field sports across many rural estates are internationally important and contribute £200M to the visitor economy. Scotland is known as a mature sporting destination that offers outstanding experiences amongst stunning and dramatic landscapes.

2.157 Scotland offers great choices from salmon on world renowned rivers such as the Tweed, Tay, Dee and Spey to red deer stag stalking, sporting bird and other country pursuits, as well as coarse and sea angling.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of country sports facilities to meet the wider tourism market supported by appropriate enabling development as required.

Wildlife Tourism

2.158 Wildlife tourism is an increasingly important activity for visitors to many parts of Scotland (2013 is the *Year of Natural Scotland*) and is worth £276M to the Scottish Economy. It is a diverse sector, responding to our abundant range of wildlife and habitats and benefits from world class settings to enjoy wildlife on land, at sea or along the coast.

2.159 According to the *Economic Impact of Wildlife Tourism in Scotland* (Bournemouth University 2010), there are over 1M wildlife trips annually to or within Scotland where this is the primary purpose. In reality the scope of wildlife tourism is greater. Wildlife tourism can be a specialist activity but more commonly it is combined with other activities such as walking, cycling, touring or photography. It is an expanding market. It provides business opportunities associated with species or a combination of species in particular habitats from bottlenose dolphins to basking sharks; ospreys to red kites and eagles; red deer to red squirrel and many others.

ACTION
Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of facilities for

wildlife tourism to meet the wider tourism market supported by appropriate enabling development as required.

Emerging Niche Markets

2.160 Outdoor activities continue to be a developing and diverse market with niche markets constantly emerging. The potential arising from the designation of the Galloway and Southern Ayrshire Biosphere Reserve and Dark Sky Park is an important example. Geotourism in the three Scottish Geoparks of Lochaber, North West Highlands and Shetlands are recent examples of international designations which can foster new opportunities to help develop opportunities serving these specialist markets. A recent example of a new sports facility in the emerging niche market in Scotland is wakeboarding near Dunbar.

2.161 Whilst the relative economic impact of these niche markets may be minor in the early years, they can play an important part in the diversity of the tourism economy for many rural areas. These minority activities can be strengthened over time and potentially developed to provide Scotland with opportunities to compete for international events which can then boost the wider profile of the destination and help grow its supporting infrastructure.

ACTION

VisitScotland together with other local and national stakeholders, will review Scotland's emerging outdoor activities to identify growth potential for the visitor economy.

Theme 6 – Destinations Towns & Cities

2.162 Our historic villages, towns and cities draw visitors who come to experience our culture and sample an authentic experience ranging from iconic destinations such as Edinburgh Castle to Skara Brae in Orkney. Our best are valued as World Heritage Sites for their outstanding universal value.

2.163 Our historic environment is at the core of Scotland's cultural heritage. It includes ancient monuments, archaeological sites and landscape, historic buildings, designed landscapes and gardens – many of which are popular destinations in their own right.

Scotland's National Parks

2.164 Scotland has seen the creation of its first two National Parks in recent years. The first National Park is Loch Lomond and The Trossachs, close to the central belt and the major population base provides a wide range of outdoor activities and is home to one of Scotland's most recognised tourism assets - Loch Lomond. The second National Park is in the Cairngorms which is the largest National Park in the United Kingdom. It provides a more rugged and wilder experience than Loch Lomond, as well as incorporating Royal Deeside.

2.165 The quality of the natural landscape within each of the National Parks is without question. The challenge is in providing a quality of accommodation, built environment and general tourism infrastructure to meet visitors' expectations which maximises the economic value to Scotland of these two internationally renowned assets.

2.166 Both National Park Authorities continue to develop a proactive approach in their development plans to accommodate sustainable developments in their respective areas. Both Authorities provide exemplar development policy frameworks[6,7] and approaches on how to plan for the visitor economy.

2.167 There are opportunities for further resort development within each Park, the need to provide more quality accommodation and develop and expand visitor attractions. It is recognised that there is also an ongoing need for investment in public realm in the key settlements and a requirement for supporting tourism infrastructure, such as the enhancement of facilities along scenic routes, improved car parking, more lay bys at scenic views, with interpretation and environmental standards of a quality which matches their designation as a National Park.

ACTION

VisitScotland along with other local and national stakeholders will work in partnership with both National Park Authorities to promote growth in their visitor economies in their development plans.

Museums & Galleries

2.168 There are over 350 museums and galleries across Scotland and these play an important part in presenting our heritage to locals and visitors. Museums Galleries Scotland (MGS) is the strategic development body for museums and galleries in Scotland. Scottish Government continues to provide support for the museum and galleries sector which, according to industry figures (*Realising the True Impact of Museums and Galleries in Scottish Tourism* – Moffat Centre Report 2011[8]) contributes £662M to the Scottish economy and supports more than 3,800 jobs. Overseas visitors contribute over £295M or 45%.

[6] http://cairngorms.co.uk/park-authority/about-us/publications?publicationID=265
[7] http://www.lochlomond-trossachs.org/planning/local-plan-2010-2015/menu-id-904.html
[8] http://www.museumsgalleriesscotland.org.uk/publications

2.169 Our museums offer a gateway for visitors to engage with living culture and their ancestral roots. The Ancestralscotland website[9] provides a digital gateway in research for Scottish ancestors with the potential to attract visitors to have an authentic Scottish experience.

2.170 The National Trust for Scotland manages an important heritage estate for the nation. This includes a world heritage site, 16 islands, 76,000 hectares of countryside, 7 national nature reserves, 26 castles, palaces and country houses along with 4 battle sites. Many are of international significance such as the Robert Burns Birthplace Museum and the battlefield of Culloden.

2.171 The National Museum of Scotland is now the first Scottish attraction to make the UK top ten, and to be in the top 20 most visited museums and galleries in the world. Nearly 1.9 million people visited the National Museum of Scotland in 2012 - the first full year of operation since its £47 million transformation. Other substantial investment has been made in our museums including the Transport Riverside Museum in Glasgow, the Scottish National Portrait Gallery in Edinburgh and the Robert Burns Birthplace Museum in Ayr. A major refurbishment of Abbotsford House in Scottish Borders is now complete.

2.172 Major investment in high impact and high economic value projects is planned for the following:

- Lews Castle in the Western Isles;
- V & A in Dundee;
- National Museum of Scotland (remaining galleries) in Edinburgh;
- Aberdeen Art Gallery;
- Heritage Centre at Bannockburn.

2.173 These provide the opportunity to develop and strengthen the overall value of the destination through associated development opportunities in the locality. Most of our historic environment can accommodate informed and sensitively managed change to accommodate new uses whilst accommodating its inherent special characteristics. Such new development opportunities with their economic benefits are welcome.

ACTION

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the regeneration potential from expansion of tourism/visitor infrastructure in support of successful museums and galleries in their development plans based on evidence of market demand.

Scotland's Cultural Activity

2.174 Scotland's culture is not limited to its heritage. Scotland continues to support a vibrant and creative culture across the arts and sciences. Galleries, theatres, concert halls and other venues provide an important and rewarding activity for visitors with many of these managed and funded by councils.

2.175 The continuing vibrancy of the creative scene in Scotland is important to the tourist experience, as well as continued investment in venues to create a positive environment in which to enjoy the cultural offerings.

2.176 The public sector has a role to play in supporting Scotland's cultural activity and this is focused around Creative Scotland as the national development agency for the arts, screen and creative industries. The public sector is also important in providing funding for venues, organisations and education; and in

[9] http://www.ancestralscotland.com/

delivering an attractive public realm outside venues. Each local authority should continue to consider the benefits of complementary uses in the vicinity of venues, including bars, restaurants, and retail.

2.177 The private sector has a role to play in managing venues, promoting and attracting performances and exhibitions, and in servicing customers both directly and through associated activity.

ACTION

Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the regeneration potential from expansion of tourism/visitor infrastructure in support of successful arts venues in their development plans, based on market demand.

Maintaining and enhancing our Public Realm

2.178 In order to remain competitive, it is vital that the quality of our natural environment is mirrored in the quality of our built environment within those villages, towns and cities which attract visitors. As well as the ongoing conservation of our heritage, there is a need to consider the overall visitor experience which is offered. This includes routes from airports, rail stations and ferry ports. Investing in public realm improvements provide a higher quality of overall visitor experience as well as serving their own communities.

2.179 This investment in public realm is generally led by the public sector. This type of investment, particularly at the major gateways to Scotland and our tourism hot spots is critical to Scotland competing internationally both for visitors and for wider investment into the economy. There is an increasing need to focus on improvements to the public realm in our city and town centres to combat the challenges arising from the changing nature of shopping. Funding mechanisms need to continue to evolve to ensure that the place attractiveness of Scotland continues to be delivered.

ACTION

VisitScotland, working in partnership with local and national stakeholders will encourage the improvement of our public realm at our transport gateways and in our main tourist destinations.

Theme 7 – Business Tourism

2.180 The business tourism and events sectors are highly competitive and discerning markets. Competitor destinations, domestically and internationally, are undertaking significant investments in upgrading existing venues as well as developing new venues and offerings. For a number of years, Scottish cities have fallen in the International Congress and Convention Association rankings. This measures the number of international association conferences hosted by a destination. Whilst several investment and refurbishment projects have been undertaken, continued investment is needed in this sector by both private and public sectors in order to enhance Scotland's competitiveness.

2.181 Developments in Glasgow for the 2014 Commonwealth Games, such as the Hydro, and on-going investments in the Scottish Exhibition and Conference Centre (SECC) and the Edinburgh International Conference Centre (EICC) as well as the Aberdeen Exhibition and Conference Centre (AECC), will continue to increase the attractiveness of Scotland as an international conference, exhibition and event destination.

2.182 The requirement by organisers for facilities to be accessible (well within an hour of an airport with direct international and regional connections) supports the need for existing conference locations to be served by improved access to our international airports. Maintaining and enhancing connectivity from our international airports with Heathrow (and Gatwick) along with expanding direct international links as well as connections to other key European hub airports is fundamental to meeting customer demand in the business tourism market.

2.183 There are many opportunities across Scotland to attract smaller conferences which can be more readily accommodated within existing venues (many owned by local authorities or the tertiary education sector) and capable of providing their accommodation requirements within the existing supply or even their own stock.

2.184 Scotland also has an opportunity to redress the current mismatch between the availability of existing conference facilities and accommodation supply. The scale of quality accommodation outside of Edinburgh and Glasgow is limited.

2.185 Throughout Scotland, the shortage of hotels offering accommodation in excess of 300 rooms is an impediment to growth in corporate conferences. Subject to identified market demand there are opportunities for quality 4 star and 3 star accommodation. Investment in new accommodation, as well as upgrading of existing supply, enables Scotland to maximise existing and future opportunities in this sector.

2.186 The thrust is to focus on supporting the expansion of existing venues in order to support conferences and exhibitions of scale. A further venue to serve the east of Scotland is needed to meet demand. New or expanded conference, exhibition and event infrastructure requires the suitability of existing sites to be reviewed in emerging development plans to ensure a co-ordinated approach to their future investment and delivery.

ACTION

Development planning authorities, in conjunction with other local and national stakeholders, are encouraged by VisitScotland to consider the potential for expansion in existing conference, exhibition and event locations through their development plans based on evidence of market demand. Any expansion needs to be supported by provision of sufficient quality accommodation at 3 star and above.

Theme 8 – Events and Festivals

2.187 Scotland has a range of iconic sporting and cultural events, which form the backbone of our events portfolio and reinforce our reputation as a world leading events destination. EventScotland promotes and supports our international and national strategy and has invested – alongside a range of public and private sector partners - in hundreds of events to date, through the international programme and the regional programme, now rebranded as the national programme.

2.188 EventScotland launched the national events strategy, *Scotland: The Perfect Stage*[10] which provides a framework for Scotland's events industry and outlines the ambitions which will lead the industry into 2020.The strategy also defines the seven key impacts by which EventScotland will measure the successes of Scotland's events industry: tourism; business; image and identity as a nation; media; participation and development; environment and social and cultural benefits.

2.189 Scotland's Years of Focus has been running since the success of Homecoming 2009 and promotes Scotland around a common theme, and a series of strategic focuses running through to 2014 will ensure co-ordinated national activity spotlighting our greatest assets.

2.190 EventScotland's National Funding Programme complements the International Funding Programme and plays an integral role in developing domestic tourism across Scotland. By supporting events which take place outside the cities of Edinburgh and Glasgow, EventScotland is also growing Scotland's wider events portfolio which forms the backbone of our events industry.

2.191 Sports and events tourism is an integral part of the visitor economy, with events such as the Year of Homecoming, Glasgow 2014 Commonwealth Games, and Ryder Cup providing an international profile for Scotland in 2014. Supporting a range of sporting activities such as adventure sports, motor sports, cycling, athletics, golf, gymnastics, rugby, sailing as well as events such as music, film, food and drink, book and cultural festivals, can extend the visitor season and direct demand to specific areas.

2.192 Scotland's events and festivals are therefore core to developing growth in the visitor economy and supporting the development strategy by helping to sustain or enhance visitor interest by extending the season or promoting interest in particular locations.

ACTION

VisitScotland encourages development planning authorities, together with other local and national stakeholders, to consider infrastructure requirements for an events and festival programme underpinning local tourism development strategies to support and expand market demand in existing destinations.

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[10] http://www.eventscotland.org/scotland-the-perfect-stage/

Aspirations and Ambitions – Our Development Opportunities

2.193 The *Development Framework to 2020* sets out the actions to deliver the development strategy for growth in the visitor economy. It provides the broad framework within which specific tourism development opportunities can be promoted and supported at the local level.

2.194 This Framework encourages the development planning authorities to consider formulating a spatial strategy at the local level where accommodation and attractions can be combined and themed to develop destinations on a wider or even regional scale to maximise the potential for attracting visitors.

2.195 Opportunities for future development have been identified through the consultation process and have been incorporated into a separate report - *Aspirations and Ambitions: Our Development Opportunities*. This information will allow each development planning authority to work with a range of local and national stakeholders to develop individual responses to this Framework through emerging and future development plans and to determine whether there is market demand to support these development opportunities.

2.196 *Aspirations and Ambitions: Our Development Opportunities* is the reference point for future opportunities in the visitor economy.

ACTION
VisitScotland recommends that development planning authorities, together with other local and national stakeholders, review the aspirations and ambitions for growth alongside the key priorities within *Tourism Scotland 2020* and use this information to inform their emerging and future tourism development strategies in their development plans.

3.0 Making it Happen

Introduction

3.1 This Framework promotes development opportunities and upgrades or additions to the essential infrastructure needed to help encourage further growth in the visitor economy and make a contribution to the targets in the national tourism strategy – *Tourism Scotland 2020*. Clearly, investment support from funding institutions and banks are necessary to sustain growth over the plan period.

3.2 Most local authorities across Scotland will have already considered the contribution of tourism as part of their Single Outcome Agreements with Scottish Government. VisitScotland welcomes the ongoing contribution that each council makes through its development plan and other plans and processes to address the contribution and role of the visitor economy in delivering sustainable economic growth at the local level.

Outcomes from the Planning System

3.3 The visitor economy is an important part of every local authority's economic well being. Much progress has been made by local authorities in promoting and integrating both economic and spatial planning strategies in their development plans. Local authorities continue to work with community partners to support the economic value of their local visitor economies through their Single Outcome Agreements. Local authorities play a hugely important role in investing in services and infrastructure which benefit the visitor economy.

3.4 Scottish Development International has the lead role in attracting international investment to Scotland, a role in which it is currently active and which in recent years has seen strong relationships developed with developers, investors and operators who have shown interest in coming to Scotland.

3.5 Highlands and Islands Enterprise and Scottish Enterprise have a responsibility to invest in tourism product development where significant opportunities exist and are currently focussing on specific tourism destinations and products where comprehensive development plans offer the largest opportunities for tourism growth. In addition, these agencies focus their resources towards supporting companies to exploit their commercial potential particularly in international markets, as well as resource major infrastructure investments in key national tourism projects such as the development of the Hydro Arena in Glasgow and the additional function space at the EICC in Edinburgh.

3.6 The role of the public sector however, goes far beyond simply making direct investments in infrastructure or in emerging projects. A strong role requires to be played by local authorities in encouraging industry action and facilitating the delivery of investment in appropriate opportunities.

3.7 Accordingly an aim of this Framework is to ensure that future decisions on tourism related development are considered in the context of an approved development plan which acts as an enabling document recognising the positive economic impact which development can bring to a locality.

3.8 The private sector role in making direct investment is prime. The business community engages with the customer on a daily basis and this informs the development opportunity and investment priorities. The private sector makes the investment to realise the new or expanded business opportunity. The private sector takes the risk and secures the benefits of a successful development opportunity for the locality and its community.

3.9 If growth is to be achieved in tourism to 2020, it is the private sector which has the key part to play in making investments meeting the needs of its customers in response to market opportunities. Investors in the visitor economy are seeking clarity and consistency in advice and predictable outcomes from development management decisions along with support in the approved development plan for projects which will contribute to sustainable growth in the visitor economy.

3.10 There is no prescriptive format for the content of a main issues report or a proposed plan. However, VisitScotland would like planning authorities to consider whether the local visitor economy and its tourism opportunities are a 'main issue' at the early stage of a development plan's preparation and to engage with as many stakeholders as possible in this action.

3.11 Through this Framework, VisitScotland welcomes the involvement of development planning authorities to further examine and develop their existing development strategies to promote growth in its local visitor economy, with each authority considering how best it can respond to develop its own bespoke requirements. Adopting the template of the customer journey in formulating its tourism development strategy in its development plan would help integrate the overall planning process across Scotland for the visitor economy with the national strategy in *Tourism Scotland 2020*.

3.12 Opportunities have been highlighted for each development planning authority to consider as part of its emerging development strategy for the visitor economy. These are set out in the Report - *Ambitions and Aspirations: Our Development Opportunities* and provide information to help update the local development strategy for the visitor economy.

3.13 Spatial guidance is needed to provide greater certainty for investors and developers in the development management process. Proposals maps should identify the appropriate locations for development proposals to serve the visitor economy. Locations need not be site specific if flexibility is required about the choice of site(s).

3.14 The appropriate development plan response will vary across Scotland, depending on the value of the visitor economy to the local economy. Supplementary planning guidance about the visitor economy and the development plan action plan can play a fundamental role in the ongoing implementation process.

3.15 Promoting best practice is recognised as an excellent way of sharing successful methods of collaborative working; proposals which are successful in delivering quality in place making (our future conservation areas) and examples of initiatives which can secure additional investment. Sharing exemplars will increase the prospects for securing other successful developments across Scotland.

ACTION
Development planning authorities are invited by VisitScotland to provide it with examples of good practice in supporting growth in the visitor economy.

An integrated approach by VisitScotland

3.16 VisitScotland recognises that benefits can be gained in collaboration over co-ordinating investment plans across the range of local and national stakeholders involved in the development of Scottish tourism.

3.17 The successful delivery of a tourism product is based upon the coming together of many different visitor experiences in such a way that it meets the particular needs of the customer. The visitor experience is dependent upon many different factors being of an appropriate quality, many of which will be in the control of different organisations and individuals.

3.18 Consequently, VisitScotland recognises the merit of an integrated approach involving local authorities, the private sector and Government agencies working in partnership to identify and prioritise the key investment requirements. Co-ordinated investment in accommodation, attractions and activities, public realm, transport and many other aspects of tourism related infrastructure is required in order for the total experience to be of the level required to maintain Scotland's global as well as national competitiveness.

3.19 This will be particularly important within the recognised tourism hotspots which draw visitors in large numbers and which play a huge part in positioning Scotland internationally. These core markets also provide the opportunity for surrounding areas to draw visitors to other local destinations and attractions.

3.20 Integration is also a key factor to encourage investment at local level where the provision of related services and facilities is often a key factor in determining whether or not a new development proceeds and ultimately is a success.

ACTION
VisitScotland along with local and national stakeholders will identify potential projects for early action and promotion as exemplars of good practice.

Action Plans for Development

3.21 To help deliver the Framework, VisitScotland will provide an enabling role to support the delivery of the tourism development strategy agreed at the local level. VisitScotland will help co-ordinate progress with local and national stakeholders through *Action Plans for Development* (APD) for each development planning authority. The *Action Plan for Development* supporting each development plan will be an important reference for assessing progress in the visitor economy at a local level.

3.22 These APDs will be collated by VisitScotland in conjunction with relevant and appropriate local and national stakeholders with each development planning authority. These will be based on the template of the customer journey and eventually, will refer to development proposals and infrastructure upgrades promoted in the local development plan - some of which may be the opportunities highlighted in *Ambitions and Aspirations: Our Development Opportunities*.

3.23 The actions and support to deliver these APDs will be provided by a range of agencies. The APD provides linkage between private and public sectors, providing progress which can then assist in monitoring and updating progress on The Scottish Tourism Alliance's national tourism strategy – *Tourism Scotland 2020*. There is no intention to hold any organisation to account about progress or compliance. The role of VisitScotland is to help facilitate delivery by bringing together relevant stakeholders who can make a positive contribution in the implementation process.

3.24 The APDs for each development planning authority will collectively form the overall Action Programme for Scotland. This will be a working document, posted and regularly updated on the VisitScotland and the Scottish Tourism Alliance websites and therefore easily available to all interested parties – recording the ongoing and planned investment being made in the visitor economy across Scotland.

ACTION
VisitScotland, working in partnership with development planning authorities along with local and national stakeholders, will collaborate in delivering growth in the visitor economy through using action plans for development.

3.25 The template for the APD is as follows:

Strategy	Development Priority	Project	Lead Agency	Budget Cost £000s	Programme			
					Year 1 000s	Year 2 000s	Year 3 000s	Commentary on progress
Improving the Customer Journey	Digital Connectivity							
	Transport							
	Accommodation							
	Food & Drink							
Providing Authentic Experiences	Nature, Heritage and Activities							
	Destination Towns & Cities							
	Business Tourism							
	Events & Festivals							

Monitoring the Framework

3.26 A Tourism Development Framework Monitoring Report will report on the progress made regarding the *Action Plans for Development* at an agreed frequency, probably every three years. This Monitoring Report will be a key tool to help all participating agencies understand progress made and if necessary prioritise action or address impediments to assist the strategy set out in *Tourism Scotland 2020*.

3.27 This Framework will be reviewed and updated every three years to help inform and continue to guide investment in tourism priorities using its 3 yearly monitoring cycle.