Introduction
The Corporate Plan takes our activity to 2020 but also builds the foundations for Beyond 2020, a decade during which Scotland’s tourism industry can accelerate from Good to Great and ultimately to World Class.

Tourism is more than a holiday experience. It creates jobs and sustains communities in every corner of Scotland and is at the heart of the Scottish Economy. Tourism acts as a showcase for Scotland, encouraging investment not only in the tourism sector itself, but, through the influence of business events, in a wide range of sectors, ranging from life sciences to the creative industries.

This is demonstrated in Scotland is Now, our country’s national brand launched in April 2018, in which tourism is a key pillar. Through strategic partnership, collaboration and leadership, VisitScotland is working with other public agencies to present a confident and joined up narrative focusing on Scotland and everything our country has to offer.

The growth in the Scottish visitor economy has been remarkable given the political, economic and social upheaval of recent years; employment in the industry rose by 11% in 2015 against the same period in 2014; GVA has increased by 42% between 2008 to 2014, a far greater rate of growth than any other growth sector; investment in tourism-related projects sits at £16bn; 206,000 people are employed in the industry, 9% of total employment, the highest level of employment since Business Register and Employment Survey records began.

However, there can be no room for complacency. Tourism is a highly competitive industry and technology is changing the way our visitors navigate the decision-making process.

From TripAdvisor defining what we liked, and didn’t, to Uber, AirBnB or Deliveroo, each has brought a different dimension to the visitor experience. These disruptors are now mainstream, but it is tourism which is leading the technological revolution.

As we saw with the success of the Spirit of Scotland campaign the future lies in personalising technology and ensuring that the visitor experience is suited to visitors’ personal preferences. Key to our success going forward will be digital capability, connectivity, collaboration, content and conversion.

Whilst our strategic focus is firmly set on embracing technology and interpreting the manifold data sources which flow from it, we cannot forget that tourism must be accessible to all and that it must be sustainable.

The relationship between the visitor economy and wider societal change, including the declaring of a Climate Emergency to address climate change and global sustainability, is increasingly important, and VisitScotland will continue to work with partners to support the sector as it adapts to and addresses these issues.

Lord Thurso M C Roughead OBE
Chairman Chief Executive
VisitScotland’s Purpose and Objectives

VisitScotland is the National Tourism Organisation for Scotland and has a crucial role to play in helping to deliver the Scottish Government’s core purpose of creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.¹

As the lead delivery agency for the visitor economy, VisitScotland will focus its resources on marketing Scotland as a tourism destination and the perfect stage for events, with the aim of attracting domestic and international visitors. In so doing, we will be ambitious and will collaborate with a broad range of stakeholders and innovators to identify opportunities to accelerate growth, increase quality and service, encourage innovation and position Scotland on the global stage in a consistent and appealing manner. In particular, we will work closely with the Scottish Tourism Alliance to contribute to the delivery of Tourism Scotland 2020 and to the development of a new Industry strategy for the period beyond 2020.

As a Non-Departmental Public Body we will also act as advisor to Scottish Ministers on tourism matters and policy affecting tourism and businesses which are part of the visitor economy. In so doing, we will work with our sponsor department to ensure tourism is taken into account across all Government policy. Similarly, we will work with our colleagues in Scottish Government to influence policy reserved to Westminster, but which may have an impact on the visitor economy in Scotland.

¹ Scotland’s Economic Strategy, March 2015

This three year Corporate Plan sets out our purpose; our key strategies; the overarching themes which will support us in delivery of these strategies; our values; and the outcomes we hope to achieve. It also illustrates how the four priorities set out in Scotland’s Economic Strategy – investment, innovation, internationalisation and inclusive growth – are woven through all of our activity.

Our plan is driven first and foremost by the work of our Insights Department. The team works with partners to generate rich insights to ensure that both the strategies of VisitScotland and those of the Scottish tourism industry are based on the best possible information and thinking. Through our Research and Statistics section on www.visitscotland.org, our participation at industry events across the country and our direct engagement with national and local industry organisations, we will share with industry a deep understanding of our operating environment, activity performance, tourism trends, worldwide markets and consumers. This will in turn enable Scottish tourism businesses to develop effective operational strategies so that Scotland becomes a destination of first choice.

Our Vision

A visit to Scotland is just the start of our job, the start of a life-long relationship that benefits the whole of Scotland. Tourism presents a unique opportunity to learn from others, build communities, share ideas, embrace cultural differences and build a vibrant and dynamic economy.
Our vision is therefore for every visit to enrich Scotland and the people we welcome. In delivering this vision VisitScotland will ensure its activities are aligned to the two key pillars of Scotland’s Economic Strategy, namely increasing competitiveness and tackling inequality.

Core Purpose

VisitScotland’s core purpose is to stimulus new and sustainable growth in the visitor economy. In so doing, we will play a key role in delivering against the shared industry ambition as set out in Tourism Scotland 2020 of growing tourism revenues by £1bn by 2020 from a baseline of £4.5bn.

Our Strategies

To deliver our vision and our core purpose VisitScotland will focus its activities across the following three strategic pillars:

• Building a visitor-shaped destination brand
  - Build long-term relationships with potential visitors and, by extension, influence investors, students and migrants; actively managing their lifetime worth to the country.
  - Build a national brand whose attributes will build awareness and propensity with target audiences and grow our long-term, national reputation.
  - Develop our own digital channels and work with indirect partners to grow the contribution of the visitor economy to the overall Scottish economy.
  - Work with regional organisations and sector partners to stimulate regional and temporal spread of visitor spend.
  - Mobilise information and advice to enhance the visitor experience and encourage visitors to spend more time and money across Scotland.

• Deliver unique and memorable sporting, cultural and business events which showcase our talents and enhance our global reputation as the perfect stage.

• Investing in Scotland’s Tourism and Events Communities
  - Draw together enterprise investment that will enable destinations, product owners and sector specialists to invest in internationalisation.
  - Work with industry partners to build the reputation of the tourism and events industry as a valuable contributor to the Scottish economy, a place to work and a platform which enriches our own culture.
  - Lead industry efforts to create a quality, end to end, measurable customer experience that attracts the most valuable visitors.
  - Work with industry partners to distribute the economic and social benefits of tourism and events across all of Scotland.
  - Provide information, at the point of need, through our iCentres, Visitor Information Partners and digital assets.
  - Provide leadership and support to the industry in key strategic areas: insight, customer experience, events, marketing, and digital.
  - Support industry upskilling and digital adoption.

• Facilitating collaboration and embracing change in a global digital economy
  - Collaborate and empower industry innovators to bring technology and new ideas to market that will enhance people’s real life experiences.
  - Draw together data sources to build a development framework that the whole industry and government can leverage to make investment and policy decisions.
Digitally enable the people and businesses within the industry to improve top and bottom line performance and invest in growth.

- Provide the intelligence and insight that enables strategic decision making.
- Provide tools, platforms and talent that empowers every DMO, local authority, event organiser and sector specialist to market and sell their own product.
- Collaborate with destinations and key industry partners to develop products that will dynamically evolve our offer.

Key Enablers

To drive our activity we will invest in talent and technology, with the following key enablers central to all that we do:

- Investing in technology that makes people’s real life visitor experiences better.
- Developing and supporting flexible, specialist and passionate people who embrace change.
- Developing and enhancing strategic partnerships as our most potent differentiator.

Our Values

Underpinning all that we do are VisitScotland’s values which have been developed internally by a cross-cutting team of staff. These are as follows:

- **People-orientated:** open; honest; cooperative; flexible; trusted; respectful; empowered; supportive; valued; respectful.
- **Innovative:** bold; fast paced; proactive; persistent; persuasive; inspiring.
- **Collaborative:** sharing ideas and information; transparent; understanding; aware; team spirit; common goals / purpose.
- **Outward-looking:** open minded; proud; aware; clear about purpose; open to change.
- **Ambitious:** constantly striving to be the best; challenging the status quo; taking the initiative; results driven.
Scotland’s Visitor Economy

Tourism is a key component of Scotland’s economy as demonstrated by its status as one of Scotland’s Growth Sectors. Growth in the sector in recent years, both in terms of value and jobs, has cemented the sector’s status as a key contributor to economic growth: between 2008 and 2014, tourism GVA grew by 42%, and the latest employment figures show overall a rise of 24,500 jobs in the tourism industry over the past five years, increasing from 181,500 to 206,000. The City of Edinburgh has the highest rate of tourism employment, followed by Glasgow City, Highland and Aberdeen City.

In addition to the national growth, there has also been a substantial increase on a regional level with tourism employment rising by 14% in the South of Scotland and by 10% in Ayrshire.

In 2018, Scotland attracted 15.3 million overnight visitors, which generated £5 billion in visitor expenditure. Further to this, 138 million day trips were taken in Scotland with a total spend of £4.7 billion. Taking into account the wider Scottish supply chain, spending by tourists in Scotland generates £11 billion of economic activity in the wider Scottish supply chain and contributes £6 billion to Scottish GDP.

Scotland’s visitor economy has grown steadily in terms of expenditure since 2012, with 2017 being the highest spend levels on record. This strong foundation is important as during 2016 and 2017 we witnessed some seismic geopolitical events which will clearly have an influence on the visitor economy. Global terrorism, the result of the EU referendum and the US Presidential Election have each generated a degree of uncertainty. Understanding uncertainty and responding to it will be crucial for Scotland’s tourism industry as it strives to play its part in continuing to grow Scotland’s economy and positioning Scotland on the global stage.

Through the first half of 2019, the slowdown of global growth has clearly taken hold. The slowdown has been synchronized around the globe, impacting the United States, Europe, China, India and large Latin American economies, notably Brazil and Mexico. At the same time, the risk of outright recession is still low for most large economies. But analysts are concerned about the growth trajectories in Germany and Japan, which create potential downside risk to the outlook.

More broadly, the ongoing uncertainties with regard to trade disputes and other geopolitical upheavals, including Brexit, impact in particular on business and consumer confidence.

There are a number of macro factors which will have an impact on tourism. These include the following:

- Economic: fluctuating exchange rates, global disposable income levels (dependent on economic growth, tax rates, interest rates etc), price competitiveness / inflation

3 OCEA Impact Model takes the direct spending by tourists in Scotland, deducts off imports and product taxes, and then estimates indirect (supply-side) activity and induced (re-spending of wages) activity. The latest estimates are based on direct spending in 2015.

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- Sociocultural: demographic (ageing populations), changing trends and cultural tastes
- Connectivity: direct air routes into Scotland, airport capacity
- Environmental: natural phenomena or disasters
- Political: Brexit, Independence Referendum, terrorism threats, policy on visas and entry process
- Technology: access to broadband, digital disrupters
- Educational: access to relevant and quality training, skill levels impacting on productivity
- Labour force: freedom of movement

Over the duration of this Corporate Plan there will therefore be the need to review priorities and potentially realign activity to address any significant changes to the landscape. The overarching purpose of VisitScotland will, however, remain the same, namely to deliver sustainable and inclusive economic growth throughout Scotland.

To capitalise on the opportunities for growth it is imperative that VisitScotland focuses its attention where the greatest opportunities exist. While the domestic market accounts for 75% of Scotland’s visitors, the strength of Scotland’s inbound markets is extremely significant: whilst the international visitor market accounts for 25% of visitors, spending by international visitors accounts for 43% of the total spend. It is clear, therefore, that the value of international visitors is much higher than that of domestic visitors, with the average spend per trip of an international visitor being £624 while the average spend per trip of a domestic visitor is £234. Internationalising the tourism industry will therefore be a key priority for VisitScotland in the period covered by this plan.

Forecasts for spending on international travel to 2022 across the globe anticipate faster growth by travellers from Asia-Pacific countries. However, it should be noted that Europe is expected to remain the travel powerhouse during the next few years. It is also important to bear in mind that a large proportion of international travel is taken within a country’s own region. This is particularly true of the Asia-Pacific region.

The top five outbound markets by spend are China, USA, Germany, Russia and the UK.

To identify the best return on investment in the short and longer term VisitScotland looks across a number of data sets (as well as building in our market knowledge). These include the current domestic and international markets for Scotland; a scale of opportunity analysis which estimates the future value of markets; the size and growth rates of the world’s biggest spending tourism markets; and a market attractiveness index which considers the international markets in terms of their growth potential and ease of access to Scotland. While Scotland and England will remain important markets for us, our international focus will be on the USA, Germany, France and Australia. We will also continue to grow our activity levels in the key markets of China and India.
GROWING SCOTLAND’S VISITOR ECONOMY – MORE VISITORS, SPENDING MORE MONEY, SUPPORTING MORE JOBS, IN MORE PARTS OF THE COUNTRY

At the heart of everything that VisitScotland does is one simple word — growth. Through all our activity, we want to bring more visitors to Scotland during the shoulder periods and during the winter months, we want them to spend more money, we want to support more jobs, we want to encourage more infrastructure investment and we want to spread the benefits of tourism to more parts of the country, ensuring at the same time that our assets are protected and preserved for future generations of visitors.

This ambition aligns to both the ambition we share with industry to increase tourism revenues by £1bn by 2020 and to the two pillars of Scotland’s Economic Strategy, namely to increase competitiveness and tackle inequality. Furthermore, our strategies reflect the four priorities set out in the strategy – internationalisation, investment, innovation and inclusive growth.

The following section sets out in more detail how we intend to deliver against each of our strategic pillars.

1. Building a Visitor Shaped Destination Brand

The most powerful form of marketing remains word of mouth. As consumers we are all far more likely to listen to people we know and trust rather than brands who push out messages through media, hoping we will listen. We are in something of a unique position — we have an international brand with the potential to differentiate and a product that people do love.

VisitScotland’s marketing strategy is simple – to drive advocacy. The advent of mass Peer2Peer mobile communication and the practical application of data science in business means that we can now drive advocacy with purpose.

Brand creative: In support of the internationalisation pillar, and in line with the Scottish Government’s drive for a more consistent and
coordinated approach to international representation, VisitScotland has worked with partners to consider how the Spirit of Scotland brand could evolve in a way that retains the allure, magic and mystique of Scotland while applying very direct and rational substantiation that will deliver across sectors; a brand that respects the past but portrays a modern and dynamic Scotland that is truly open for business. This collaborative initiative resulted in the launch of a new collaborative campaign platform, Scotland is Now. We will continue to work as part of the Team Scotland partnership to develop this collaborative campaign, focusing our visitor marketing activity on the Scotland is Now brand creative.

**Discovery Plan:** More than two decades ago, Bill Gates declared “Content is King”. Never a truer word has been said. In a world where consumers are exposed to thousands of messages every day, getting the right content to the right people and at the right time is absolutely critical. Content creation will be at the heart of everything we do, not only in VisitScotland, but importantly with our industry and strategic partners so that they have inspiring stories to share with our visitors. We will develop our “Discovery Plan” to ensure that our content meets with that crucial search engine approval, using innovative approaches to establish who our potential visitors are, the kind of content they are looking for and, specifically, the searches they run in Google to find this. We will overlay this with seasonal search trends to ensure we’re getting our content out there at the times of the year when our visitors are looking for it. And importantly, we will look at the types of content our audience enjoys, engages with and the right platforms and formats.

**Digital and Social Channels:** In support of the Discovery Plan we will distribute content and digital advertising on channels such as Facebook, Youtube and a plethora of other media owners where we can use behavioural data to find the people willing to hear from us. Ultimately, by leveraging this data it allows us to use permission-based marketing techniques rather than traditional interruptive ones. This has a massive impact on the perception of the brand and the campaign’s bottom line. Social media is an increasingly important channel for content delivery and can have a huge influence at the start and end of a visitor’s journey to Scotland. Engagement is vital to success on social media and will therefore be at the core of our social media strategy. Already, engagement from our fans and followers has grown to an audience of more than 1.5 million. Our focus for the future will be to look at new innovative technologies and social platforms as they emerge to ensure we’re always maximising engagement.

**Harnessing Networks of Influence**

Partnerships at various levels are a crucial part of our strategy. People contemplating trips are very receptive to advice provided by trusted influencers from a variety of sources. We will weave together a complex range of owned tools (www, app, community, iCentres, CRM, social) with industry networks, partner brands and media channels to create our very own network of communications, powered by Scots and those who love Scotland. Through innovative partnership working we will work closely with organisations such as TripAdvisor, Google, NBC, The Guardian and The New York Times to distribute the best of our content. These kinds of associations will strengthen our reach and reputation in key markets.
2. Investing in Scotland’s Tourism and Events Communities

Information Provision

iCentre Hubs: While new technologies allow us to engage in new and innovative ways, the power of the personal touch is still important when it comes to providing inspiring information. Our iCentres will remain at the heart of information delivery for visitors on arrival, providing a showcase for VisitScotland and our partners in key locations across Scotland. Our streamlined network of iCentres will allow us to focus on delivering a high quality service in the right place, with the right look at the right cost, employing the right people.

Outreach: We will also build on our outreach programme, extending the reach of the VisitScotland Coovans which will take information to visitors where they are. We will complement this personal service with innovative technology enabling VisitScotland to provide online information wherever we go.

VIP Programme: To extend the reach of the iCentre network, we are working with partners both at a national and a local level through the VisitScotland Information Partner Programme. This programme recognises and supports the great effort businesses, organisations and communities across all sectors undertake to bring the Spirit of Scotland to life by providing valuable local insight and a level of information that only a person who knows a place well can give them. Already more than 2,000 partners have signed up to the programme. We will continue to develop this programme to secure more partners and thereby extend the footprint of visitor information across the whole country.

Quality and Sustainability

For more than 30 years VisitScotland has operated quality assurance schemes. It is recognised globally as a world leader and we have exported our knowledge to a number of countries, including Sweden, Belgium, Malta, Canada, Northern Ireland and Namibia to mention a few. In response to the seismic impact of the digital visitor economy and rapidly changing consumer behaviour, we recently undertook a review of quality to consider how we might approach it in the future. Our aim is to promote and facilitate the continuous improvement of total quality of the visitor experience in Scotland, building on the strong foundation and economic impact delivered to date by the quality assurance schemes. This represents a shift in thinking and our role will be based around leadership, influence, catalysing quality improvement and investment, and strategic partnership.

Total Quality Experience: Based on the findings from both online research and a series of industry focus groups, VisitScotland is viewing quality in a new and different way. We will retain our role as the champion of quality and the visitor experience for Scotland’s tourism industry. However, we will also lead, coordinate and act as a catalyst with destinations, sectors and individual businesses to improve the overall visitor experience by providing data, insights and advice to help them better understand consumer trends and the future. This will be shaped around three specific channels: business to business; business to consumer; and consumer to consumer. Working with partners across all parts of the customer journey and key commercial operators, VisitScotland will be involved in the monitoring and promotion of quality
and influence of the overall quality of the total quality experience. To test this new holistic approach, VisitScotland will introduce pilots with a view to developing a national approach to monitoring and enhancing the overall quality of the visitor experience.

While we are developing this new approach, VisitScotland will continue to operate an accommodation star rating scheme. In so doing we will streamline assessment criteria and look to incorporate user reviews and develop a package of business advice and support which encourages excellence and improvements to the visitor experience. In recognition of the importance placed on the visitor attraction scheme as a business development and benchmarking tool, a revised version of the scheme has been launched.

Skills: Those who work in the tourism sector also have a crucial part to play in ensuring that our visitors have a fantastic experience and go home to spread the word. VisitScotland, through its membership of the Tourism Skills Group, will contribute to the delivery of the Tourism Skills Investment Plan. For example, we will raise awareness among our Quality Tourism Advisors of Skills Development Scotland products and services and the wider skills landscape.

Inclusive tourism

Inclusive Tourism can mean a lot of different things. For VisitScotland it’s quite simple – it’s about ensuring that Scotland is a welcoming destination where tourism is available and accessible to all and communities in every corner of the country benefit from jobs and economic growth.

Accessible Tourism: Accessible tourism enables people with access requirements, including mobility, vision, hearing, to function independently with equity and dignity through the delivery of universally-designed tourism products, services and environments. These improvements not only benefit those with permanent disabilities, but also parents with small children, senior travellers, people with temporary injuries, as well as their travel companions. The accessible tourism market was worth £1.3bn in 2015 and VisitScotland’s accessible tourism programme aims to ensure that tourism in Scotland is inclusive and available to all and fully realise the economic benefits of what is a growing market.

Already we have led on a number of initiatives, including delivery of events engaging more than 700 tourism businesses; the introduction of basic assessment of accessibility actions during our Quality Assurance visits and the introduction of five internal Accessible Tourism Champions within our network of Quality and Tourism Advisors; production of a new guide aimed at helping event organisers to make their events more inclusive; introduction of two new accessible tourism destinations, #AccessibleFife and Everyone’s Edinburgh; and redevelopment of our Accessibility Guide website in partnership with VisitEngland.

To support the new website we will run a promotional campaign aimed at encouraging as many businesses as possible throughout Scotland to take advantage of the new Accessibility Guide. We will also work with our partners in Scottish Enterprise to run a series of innovation workshops for the industry to build on the legacy of the Commonwealth Games.

VisitScotland supported the Glasgow 2018 events programme, including the European Championships and three international medical
conferences, each of which brought delegates who required a different and more inclusive approach from the tourism industry. Accommodation providers and attractions were encouraged to write an Accessibility Guide and to develop further assessable itineraries.

As a legacy of the Year of Innovation, Architecture and Design, we have developed an Inclusive Design Guide to support building refurbishment and redevelopment. Furthermore, in support of all our work in this area, we are developing an accessible communications guide, covering all communication channels, digital and face to face.

Social Tourism: As the national tourism organisation it is our role to ensure that Scotland is an inclusive, welcoming destination for all. The fact is, however, that in Scotland today, one in three people miss out on being a visitor in their own country due to disadvantaged backgrounds. This means that hundreds of thousands of families miss out on the great benefits that a short break in Scotland can bring.

Cost is a major factor for many people, while others are not able to participate due to ill-health or caring responsibilities. Some people lack the confidence while for others, staying within their own community is all they know.

There are already a number of initiatives in Scotland to support those more vulnerable in our society to take a break, including initiatives to provide respite to carers and to support children with disabilities. However, inspired by the work of our partner VisitFlanders, with whom we have an information sharing agreement, VisitScotland has focused its efforts on helping families from economically disadvantaged backgrounds.

In 2016 we ran two pilots with the Family Holiday Association which enabled more than 250 vulnerable and disadvantaged families in Scotland – nearly 1000 people in total – to take a much-needed short break or day trip in Scotland. One was a national initiative providing weekend breaks across Scotland; the other was a regional initiative, enabling families from the wider Glasgow area to enjoy days out across the city and surrounding regions. The results were overwhelming with 90% feeling more able to cope, 88% feeling more optimistic and 80% having more confidence as a result, not to mention 98% having fun and creating happy memories.

Building on the success of these pilots, VisitScotland has continued to work with industry and strategic partners to nurture industry support to help deliver similar initiatives, including extending the benefits of the Glasgow regional pilot to other parts of Scotland. We will also consider what needs to be done to raise greater awareness of social tourism and its benefits for both inclusion and business. This may include research on the benefits, impact and potential of social tourism, as well as research on the wider benefits such as reduced pressure on health and welfare services as a result of happier, healthier families and individuals.

Local engagement and Enabling Growth: For tourism to be truly inclusive it is important that the economic benefits of tourism are felt in every local economy across the country. VisitScotland believes that Scotland’s destinations are key to the maximisation of our economic benefits and, working in partnership with the Enterprise Agencies and Business Gateway, we will take the lead in supporting them in their attraction strategies, growing local capacity and improving access to market.

Local engagement will be key and will act as a powerful bridge between national initiatives, organisations and local communities. VisitScotland
already engages with a variety of organisations at local level that bring passion, pride and local knowledge to the overall tourism canvass. However, we recognise that there is more that we can do to provide more focus and coordination, supported by insights we can share, to improve the planning, promotion, development and delivery of tourism activity on a sustainable basis at local level.

While VisitScotland cannot provide financial support on a sustained basis to the plethora of local organisations, there is still a lot we can do. Support may take the form of human resource, knowledge and expertise in the form of a package of interventions to improve the overall visitor experience. This could include insights, data and advice on quality, information provision, digital connectivity and digital capability both at a destination and individual business level. VisitScotland will work with its partners in the public sector and industry groups, specifically the Scottish Tourism Alliance and the Industry Leadership Group, to consider how best to package support for local engagement and agree an prioritised action plan for key destinations focused on sustainable economic growth.

Importantly, VisitScotland is seeking to take a new approach to how we engage locally. Rather than working for Scotland, we will work with Scotland. While our leadership role will remain important, we will also take on the role of enabler, providing support to local businesses and communities to make the most of their tourism offering. In particular, we will look at ways we can support SMEs. Tourism is dominated by SMEs which account for over 90% of all businesses in the sector. We know that many are not digitally mature, have low productivity rates, have limited exposure to international markets and, individually, have less impact on the Scottish economy than those designated as high growth. However, we believe that collectively these businesses could make a significant contribution to economic growth, employment, internationalisation and the sustainability of small, fragile communities. We will therefore look at how best we continue to support them to grow.

In line with the commitment in the Programme for Government to focus particular attention on the South of Scotland and the focus on the development of the Ayrshires, our plans for local engagement will ensure that both these areas are recognised as key priorities. We contributed to the work of the Enterprise and Skills Review and continue to support the development of the new enterprise vehicle for the South of Scotland.

In addition, VisitScotland will seek to work with the City Regions. Areas where VisitScotland can seek to influence relate to support for SMEs, connectivity, development of the labour market, digital, food and drink, and business events. VisitScotland will seek to work with partners in the established City Regions to understand how tourism could benefit from commitments already agreed and will seek to influence thinking in the development of the remaining Deals. Similarly, we will seek to engage in those areas beyond the cities where growth deals are being developed, e.g. in the Ayrshires and the Islands.

**Intermediary Marketing**

VisitScotland will continue to encourage and assist tourism businesses to grow their business internationally, with a core focus on regional and seasonal spread. Despite growing internet penetration, many visitors to Scotland still book their entire package, or elements of their travel, through an intermediary or travel professional, particularly in the longer haul and emerging markets and among high net worth travellers. We will therefore focus our efforts on establishing how leisure travel is sold and
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distributed in our key international markets, and specifically which companies are responsible for selling Scotland holidays. Once identified, we will manage these companies through an in-depth key account system, taking them from maintenance to development to partnership, with the objective of providing the expertise and support required to continually grow the range and volume of their Scotland tourism products and sales.

VisitScotland Expo and its complementary regional familiarisation trip programme will be the core activity which represents the best opportunity to engage with and convert our key accounts to develop and sell Scotland. We will, however, also continue to develop our range of business development missions, offering platforms to businesses to engage with key accounts on territory. In addition, we will develop strategic and commercial partnerships and will integrate nurtured partner content in our own channels to drive customer conversion.

Aviation

As a key partner in the Team Scotland effort, VisitScotland, working with Scottish Government, Transport Scotland and Scottish Enterprise, has already played a significant role in bringing new air routes to Scotland, including new and expanded routes from North America, Europe, China and the Middle East. The ongoing improvement of the Scottish air route network is not only important for growing inbound leisure tourism, but also supports business tourism and provides vital connectivity for exporters across all sectors.

We will continue to pursue opportunities both on point-to-point and, critically, with those carriers who can deliver onward connectivity via major international hubs and airline alliances.

Events: Scotland the Perfect Stage

There is no question that Scotland punches above its weight for attracting major events and continues to offer an excellent and trusted host proposition to the owners of the world’s most prestigious events properties. This reputation was cemented in 2014 following the XX Commonwealth Games and the 2014 Ryder Cup and was further enhanced by the staging of the 2015 Turner Prize, the 2015 World Gymnastics Championships and the MOBO Awards on multiple occasions. The challenge is to maintain a world-leading events programme for Scotland over the coming years which can be used to deliver on tourism and wider objectives.

VisitScotland will support the delivery of the national events strategy, Scotland the Perfect Stage. This will entail working with partners to sustain, develop and promote Scotland’s international profile as one of the world’s foremost public-facing events destinations and as the Perfect Stage for events.

Core funding programmes: Through its dedicated EventScotland team, VisitScotland will continue to focus on developing Scotland’s already varied events portfolio through a suite of distinct funding programmes: International Programme; National Programme; and the Beacon Programme. Continued investment in events through these programmes will help to maintain Scotland’s position as the perfect stage for events but will also contribute to economic growth. Scotland is a world-leader in
utilising events within its international tourism marketing strategy and we will therefore look to develop and expand our events messaging through Scotland is Now. We played a key role in the delivery of the 2018 European Championships and will be involved in the UEFA EURO 2020, ensuring we maximise the benefits that staging them present for Scotland. In 2019, we will play the lead role in delivering the 2019 Solheim Cup, building on our expertise following the 2014 Ryder Cup. Through delivery of the National Fund, which focuses on events outwith Edinburgh and Glasgow, we will contribute to the delivery of inclusive growth, helping to sustain local communities and economies across all of Scotland.

Themed Years: As the lead delivery partner for the Year of History, Heritage and Archaeology, VisitScotland delivered a programme of funding to support events aligned to the theme.

We also worked with Scottish Government and partners in the delivery of the Year of Young People in 2018 not only to implement the events programme, but also to maximise awareness of the Year and promote opportunities for people to engage at home and abroad. We are currently working with partners on the future themed years of Year of Coasts and Waters in 2020 and Scotland’s Stories in 2022.

Golf Legacy: Our investment in golf has allowed Scotland to remain competitive despite a dramatic increase in competition from other destinations, including the UAE, Turkey and North Africa over the last 10 years. VisitScotland’s golf marketing activity is, uniquely in world terms, predominantly event-led. Hosting major golf events is a fantastic shop window for Scotland, showcasing our outdoor environment from north to south and east to west. Without this investment, it is estimated that an average of £60 million in economic impact could be lost annually, not only to the tourism industry but also further down the supply chain. We will continue to deliver the golf legacy programme up to 2020 to maintain Scotland’s reputation as the Home of Golf and will seek to consider how this might be extended further.

Future proofing: As well as sustaining a strong and varied portfolio of events which prioritises and protects the most successful recurring events in Scotland, we will research and gather intelligence in order to fund new events with potential or those that break into new areas. We will seek to take managed risks by assessing new and innovative events which adopt cutting-edge technology, broach new subject matter or seek to target untapped demographics which will further diversify Scotland’s events offer. As part of this process we will give consideration to new innovative ways of working, which could include commercial partnerships, different funding models and mass participation events.

Business Events: As business delegates typically spend double the amount of leisure visitors, securing business events – whether they be major conferences, business meetings or corporate incentive reward trips – to Scotland has a significant impact on the economy. Already through the investment of the National Conference Bid Fund VisitScotland has secured dozens of conferences up until 2022. Through our Innovate the Nation programme we will dovetail with the strong ambassador programmes in Edinburgh, Glasgow, Dundee and Aberdeen to ensure national coverage across the academic hubs and centres of excellence. Innovate the Nation will work to find academic ambassadors who can influence an international conference to come to Scotland. Through a series of networking events we will attract new ambassadors and engage with active members.
We will continue to work with corporate planners and professional meeting organisers to convince them that Scotland can deliver – not only an outstanding quality of meeting, conference or incentive, but that long after the event is finished, delegates keep a lasting positive memory of their experience here – that spirit of Scotland. It’s that lasting impression that can transform what was an experience at a business event in Scotland into something much more impactful for the Scottish economy. Business events showcase Scotland’s expertise to a global audience. Showcasing the country’s academic prowess and skills in key sectors from Life Sciences to Energy contributes to potential inward investment and developments in infrastructure. Moving forward, they are the catalyst for boosting education and innovation in those fields, attracting new talent to the country, and importantly, positioning the destination as a world leader on the international stage. We will therefore continue our strong working relationship with Scottish Enterprise and Business Tourism Scotland to develop the business events sector.

**Developing the Events Industry:** To support the events industry in its efforts to grow, we will continue to provide support by leading and advising; providing information and training; sharing best practice; and encouraging the industry to focus on quality delivery.

3. **Facilitating Collaboration and Embracing Change in a Global Digital Economy**

**Empowering and Enabling the Industry**

It’s a subtle shift but for VisitScotland it’s an important one – we will market Scotland **WITH** Scotland not **FOR** Scotland. This means providing the industry and local communities with the tools they need to create and distribute their own content but, more importantly, convert that interest in Scotland into a sale.

**Digital platforms:** We want our digital platforms to be the best place for our industry partners to showcase their products. In the past year we have redesigned our website and launched a number of tools which do just this – the online community, account function and trip planner. However, this is just the beginning. We will continue to test, develop and improve on these new releases. We will revamp the tours section of the website with a view to making it easier to find and book guided tours of Scotland.

**Industry Digital Provision:** Digital inclusion is essential if Scotland is to deliver genuine inclusive growth. Through our support of the Digital Tourism Scotland initiative we will help tourism businesses to maximise the opportunities of the various digital platforms and we will seek to assist tourism businesses in their efforts at digital self-promotion. We will continue to offer a free Digital Review service, building on the almost 2000 already delivered, helping businesses to understand how visitors find their website and what they do there; how their online presence can be improved; and how they can financially benefit from making recommended changes. We will also continue to develop our relationships with a variety of Web Booking Engines (WBEs) allowing website visitors to search for live accommodation availability and pricing on visitscotland.com. We will look to increase the number of businesses which have integrated their preferred WBE with visitscotland.com from the current level of 49%. Furthermore, having reached a stage where 99.8% of businesses meet the minimum standards for a listing, we will work with businesses to enhance those listings.
National Tourism Development Framework

A total quality experience relies on Scotland having the correct infrastructure and the right products to meet consumer demand. To better understand the national picture, VisitScotland developed the first ever National Tourism Development Framework in partnership with COSLA, Scotland’s 34 planning authorities and key national strategic partners in June 2013. The initial framework covered the period 2014 – 2016. A refresh exercise was carried out in 2016 and at the beginning of 2017 we launched a refreshed framework covering the period to 2020. Through a greater focus on co-ordination, the actions proposed by the Framework refresh will help secure added value from future investment in infrastructure and promote engagement with the development plan system to realise future opportunities.

In terms of its relationship with Tourism Scotland 2020, the document focuses on the investment and development opportunities arising from two key parts of the strategy - Improving the Customer Journey and Providing Authentic Experiences. Working with our partners we will work across a number of areas to encourage positive action:

- **Transport, both travelling to and travelling around Scotland**: we will work with operators, Transport Scotland, Regional Transport Partnerships and others to encourage improvements to transport interchanges, stations and ports, and to integrated ticketing, to enhance the visitor experience and enable greater accessibility to all modes of travel. We will also encourage the development of a series of scenic tourist routes throughout Scotland.

- **Accommodation**: working with SDI, which has lead responsibility for inward investment, we will seek insight from local and national stakeholders to identify locations for investment in new hotels both in city centre locations and in rural areas, including the country house hotel product. We will also encourage investment in other forms of holiday accommodation in rural areas where deficiencies are identified.

- **Nature and activities**: we will encourage planning authorities together with other local and national stakeholders, including the Crown Estate, to consider development opportunities relating to paths and trails, forest tourism, the marine environment, Scotland’ canals, snow sports, golf, cycle tourism, country sports tourism and wildlife tourism as well as working in partnership with both National Park Authorities to promote growth in their visitor economies.

- **Heritage and culture**: we will work with planning authorities together with other local and national stakeholders in support of successful heritage and culture assets

- **Destinations, towns and cities**: we will work in partnership with local and national stakeholders to encourage the improvement of our public realm.

- **Business tourism**: we will encourage planning authorities, together with other local and national stakeholders, to consider the potential for expansion in existing conference, exhibition and event locations, including a strategic review of hotel provision required to support the business events sector.

- **Events and festivals**: we will encourage planning authorities, together with other local and national stakeholders, to consider infrastructure requirements for an events and festival programme.
Having established the framework, the next step is to turn it into a more meaningful and dynamic document that will more accurately define investment and development opportunities. We will consider how current provision could be matched with future demand using data analytics and research trends, to create a more valuable, dynamic planning tool. To assist with this process, VisitScotland will pilot a mapping and gapping exercise in three locations using consumer demand data to overlay supply and identify potential development opportunities.

**Data**

Through digital technology we will be in a position where we can innovate at great speed in a world that is new, complex and quite daunting. We will use digital technology to enable us to understand a great deal more about the needs and behaviour of potential visitors, as well as the feedback they give us about the experience they have when they do visit. Work will focus on enabling us to analyse patterns in travel, demand and spend with a view to building predictive models that will help inform investment.

Analysis of data will also allow us to better understand the impact of our own activity and will drive our marketing investment priorities to ensure a greater return.

**Growth Fund**

VisitScotland’s competitive grant award programme supports collaborative tourism marketing projects which focus on growth in the tourism sector and ensure that visitors experience the true Spirit of Scotland. The fund supports groups in leveraging additional and focused marketing investment, stimulating collaboration within the industry, closer working with VisitScotland and achieving strategic alignment with the national Tourism Scotland 2020 Strategy.

**4. Enabling VisitScotland: Good to Great to World Class**

**Our People Strategy**

Our vision is to be an employer of choice which rewards, harnesses, nurtures and develops our people in an environment which is progressive, ambitious, outward-looking, fair and collaborative.

**Managing Change:** In future, VisitScotland will need to be rightsized and re-aligned in line with our strategic direction. Specifically, we need to ensure the organisation is properly prepared for upcoming changes in structure and function as we change to become more digitally-focused and advice-centric. This includes managing downsizing and restructuring of the workforce as necessary and will involve significant skills re-profiling across the organisation.

We have already refreshed our value set to reflect the sort of organisation we want to be and we need to develop the culture of the organisation to support and reflect these values through the behaviour and attitude of our staff.

We have put together an Engagement Team made up of representatives from each directorate, and each member of this team is distinguished by their enthusiasm and commitment to VisitScotland and by demonstrating the kind of behaviours that we want to spread through the organisation.
This group will drive culture and behaviour changes within the organisation through 2019 and beyond.

**Talent and Performance Management:** VisitScotland has begun to develop new and innovative ways to manage high potential/high performing talent with the introduction of a new performance and talent management process for 2017/18. This will allow us to assess our current talent against what is required in future and will support the necessary re-profiling for future skills needs and for succession planning. This will also be complemented by a comprehensive career mapping system to allow staff to identify promotion pathways throughout the organisation.

We are also embarking on a new management development programme which as well as offering a management qualification, will also be specifically customised to address our leadership requirements over the next few years where managing change will be a vital skill.

**Youth Employment Strategy:** VisitScotland strives to provide and promote meaningful Youth Employment opportunities that benefit individuals, the organisation and the Scottish economy and to be recognised as an exemplar within the Public Sector. In 2016 we were awarded the Investors in Young People Gold Award.

We run a number of key Youth Employment programmes including:

**Graduates:** We provide a 12 month employment opportunity to graduates from a wide variety of disciplines. We currently offer seven graduate scheme placements across all our Directorates. We provide them with a wide range of development experiences whilst they work within their role including: coaching on CV writing skills, interview skills, assessment with Myers Briggs Type Indicator (MBTI), attendance on The 7 Habits of Highly Effective People programme and participation in a wide range of “outreach” activity to gain insight into VisitScotland.

**Modern Apprentices:** We currently have a commitment to employ six Modern Apprentices (MA’s) each year across all of our Directorates. An MA will study and work / develop for one year and then on successful completion will be offered a one year fixed term contract in their current role. Over the last four years we have employed at least one MA between the age of 16 - 21 within each of the five Directorates.

**Internship Placements:** We are currently offering four paid internship opportunities to University students studying a range of qualifications. These opportunities are for a fixed term of 3 months at 16 hours per week. We tend to target these placement opportunities in some of our more difficult to recruit areas such as Digital or Insights.

**Career Ready Mentoring:** We currently participate in the National Career Ready Mentoring scheme, providing six employees each year to be mentors to 5th Year High School pupils from underprivileged schools and communities for a period of two years. Part of the mentoring scheme is the opportunity to work for four weeks within VisitScotland’s iCentre at the full Scottish Living Wage.

**Work Experience:** We offer work experience placements of one week across our Directorates but primarily in our customer facing iCentre roles. We also offer them additional training to ensure they are prepared for
the job market. This includes coaching on CV writing skills and interview skills.

**Education Liaison:** We currently have a team of over 30 employees across the country from Inverness to Gretna who have volunteered to act as “Education Liaison” staff to support Schools, Colleges and Universities by delivering workshops and presentations to pupils on a range of tourism related topics.

**Pay and Reward:** A review in 2016 highlighted that our pay structure was not sufficiently competitive in some employment markets and the upshot was that it had become increasingly difficult to attract and retain employees with certain skill sets required to drive organisational performance going forward. We have used the outcome of that review to inform a revision of our pay and grading arrangements.

A review of our current benefits package has, however, shown that VisitScotland compares favourably to other Public Sector bodies in the range and quality of benefits we offer. To emphasise these benefits we intend to produce individualised Total Rewards Statements in 2019.

**Equality of Opportunity:** Much work has already been undertaken to ensure that VisitScotland is recognised as an equal opportunities employer, guided by the Scottish Government’s Fair Work Convention which drives forward a number of key initiatives including gender equality, workplace democracy, employee and trade union engagement and fair pay.

Initiatives at VisitScotland include replacing zero-hours contracts with ‘minimum guaranteed hours’; applying the Scottish Living Wage to all, including Modern Apprentices and interns; piloting career progression mapping; and supporting personal development opportunities for all staff including support for those seeking professional qualifications.

Further activity includes the introduction of a Wellbeing and Mental Health Policy, production of VisitScotland’s Mainstreaming Equality Report and the provision of diversity and equality training and support. We have also established an internal Equality Steering Group, made up of staff and managers, to ensure that equality objectives and outcomes are set and achieved.

**Knowledge Exchange**

Over the past 10 years VisitScotland has been working with partners across the globe, sharing knowledge and expertise primarily, although not exclusively, in relation to our quality assurance schemes. Building on this approach, VisitScotland is developing a strategic approach to engaging with other national tourism organisations, focusing not only on the sharing of best practice but on the bringing back of expertise, with a view to the continual enhancing of our own activities and impact, as well as the building of our reputation on the global stage.

From this engagement, it is clear that VisitScotland’s experience and expertise in developing a sustainable tourism economy is valued across the globe. As a national tourism organisation, we hold considerable international credibility and reputation as an organisation of excellence. We will continue to develop strategic partnerships, building on our connections with partners such as Visit Flanders, Nova Scotia, Iceland, Queensland and Malta.
Europe

Through its work with Scotland Europa VisitScotland has developed a strong relationship with key stakeholders including the European Commission and the European Parliament as well as with leading representative organisations such as NECSTouR, the Network for European Regions for Sustainable and Competitive Tourism, and the European Travel Commission (ETC). Through this engagement we work to raise the profile of Scotland’s approach to delivering for the visitor economy, build on Scotland’s reputation on the European stage and enhance our own approach to delivering for Scotland by learning and exchange with key stakeholders.

While the future relationship with the European Union remains uncertain, VisitScotland will continue to engage with partners at a European level to identify opportunities for mutual knowledge exchange and opportunities to enhance Scotland’s reputation as a leader in the development of the visitor economy.

Team Scotland

Working with our partners across Team Scotland is key to our success and while the focus may be slightly different for each of the partners, we all have the same goal – to deliver a more productive and cohesive Scottish economy and position Scotland on the global stage as a place to visit, work, invest, study, live.

We will play an active role in coordinating international activity across the public and academic sectors to deliver maximum benefit for Scotland. In particular, the launch of the Innovation and Investment Hubs will provide an ideal opportunity for the Team Scotland partners to pull together collectively their expertise and skills. We will support delivery of the Hubs through active engagement, particularly in London which acts as a global gateway, helping to support businesses to trade internationally. We will also continue to develop our relationship with SDI as we help Scotland’s tourism businesses to internationalise.

5. Conclusion

Tourism is everyone’s business. It impacts on every part of the economy, reaching every part of the country. Its touch points across Scottish Government and Team Scotland partners are extensive. As we strive to grow the contribution that the sector makes to Scotland’s economy we look forward to working with our partners across not only the tourism industry but right across the supply chain.
The Impact of the Visitor Economy

Visitor Economy

Professional Services
- Lawyers
- Accountants
- PR and marketing
- Banking
- Insurance
- Interior designers
- IT services

Day to Day suppliers
- Laundry services
- Builders/trades people
- Drinks suppliers
- Food providers
- Cleaners
- Gardeners
- Crockery suppliers
- Carpet suppliers

Event Services
- Wedding planners
- Conference planners
- Florists
- Hairdressers
- Marquee providers

Things to do
- Activity providers
- Restaurants
- Pubs and Clubs
- Music venues
- Shops
- Attractions

Transport
- Car hire and taxi companies
- Airlines
- Trains operators
- Ferry companies

Investment opportunities
- Image of Scotland
- Welcome of Scottish people
- Connecting business and tourism
- Scotland as a place to visit and invest
National Performance Framework

This Corporate Plan has been prepared in the wider context of the Scotland’s Economic Strategy and to support and show our contribution to this, we measure our performance through the National Performance Framework. We have aligned our strategies and focused our activities to contribute to several of the Government’s Purpose Targets and National Outcomes as outlined in the diagram below.
In order to implement this plan, we will produce and deliver a Strategy Framework articulating our direction of travel, Project Initiation Documents (PIDs), which provide specific actions, responsibilities and budgets to bring our objectives into effect.

We will produce a one year Operating Plan which summarises these activities and provides Key Performance Indicators to measure our performance. Our annual plan is a dynamic document and will be regularly maintained and is available on www.visitscotland.org.

As well as regular reporting to our Board, we will present an Annual Report and Accounts to the Scottish Parliament meeting the relevant statutory requirements.
Effective Governance

The Board has corporate responsibility for ensuring that VisitScotland fulfils the aims and objectives set by Scottish Ministers, and in so doing shall demonstrate high standards of corporate governance at all times. In pursuit of this the Board has established two Committees to scrutinise certain areas of activity in greater depth and make recommendations to the Board. There is an Audit & Risk Committee, and a Remuneration Committee.

Through its Audit & Risk Committee, the Board fulfils its role of Corporate Risk Governance. The corporate risk register not only identifies all high-level risks which impact on the whole organisation and are likely to affect the achievement of objectives contained in the annual operating plan, but also it covers lower-level risks which affect specific areas of operation within VisitScotland.

Risk management has been fully incorporated into the corporate planning and decision making processes of the organisation. Preparation of annual departmental operating plans includes a review of existing risks and discussion of any potential new risks. Economic and environmental scanning are key components in this process. They assist in identifying global factors which may affect the business and aid planning to mitigate them. Risks are also identified, managed and reported at project level through project managers.

The Remuneration Committee is made up of the full Board. The purpose of the committee is to:

- review the annual salary and performance-related bonus proposals of the Chief Executive and Directors, in line with Scottish Government guidelines;
- consider any changes in the terms and conditions of employment of the Chief Executive and Directors;
- submit any proposed changes to the Chief Executive’s salary and any performance-related bonus payable to the Scottish Government for approval;
- deal with such other matters as may be referred to it by the Board members.

VisitScotland is committed to ensuring gender balance on its Board and through the course of 2016 secured a 50:50 gender balance. We recognise the role we have to play in promoting equality across the workforce.
## Financial Overview 2018-19

<table>
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<tr>
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<th>2016/17</th>
<th>2017/18</th>
<th>2018/19</th>
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<tr>
<td><strong>INCOME (£m)</strong></td>
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<td>Actuals</td>
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<td>Total SG Funding</td>
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<td>Commercial Income</td>
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<td>Retail Income</td>
<td>1.74</td>
<td>2.02</td>
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<tr>
<td>Local Authority Funding</td>
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<td>0.83</td>
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<tr>
<td>Other income</td>
<td>1.78</td>
<td>1.03</td>
<td>0.16</td>
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<tr>
<td><strong>Total Resource</strong></td>
<td>54.05</td>
<td>54.00</td>
<td>56.95</td>
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**EXPENDITURE by ACTIVITY**

<table>
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<tr>
<th>Activity</th>
<th>2016/17</th>
<th>2017/18</th>
<th>2018/19</th>
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<tbody>
<tr>
<td>Marketing activities</td>
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<td>42.36</td>
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<tr>
<td>Partnership Engagement</td>
<td>4.07</td>
<td>3.69</td>
<td>3.48</td>
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<tr>
<td>Support Services</td>
<td>6.10</td>
<td>5.97</td>
<td>5.64</td>
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<tr>
<td><strong>Total Operating Cost</strong></td>
<td>51.05</td>
<td>52.02</td>
<td>49.12</td>
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<tr>
<td>Capital Grant</td>
<td>0.79</td>
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<tr>
<td><strong>Total Cash Expenditure</strong></td>
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<td>53.04</td>
<td>54.37</td>
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<tr>
<td>Non Cash</td>
<td>2.21</td>
<td>0.96</td>
<td>2.58</td>
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<tr>
<td><strong>Total</strong></td>
<td>54.05</td>
<td>54.00</td>
<td>56.95</td>
</tr>
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**Allocation of Resource**

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<tr>
<th>Activity</th>
<th>2016/17</th>
<th>2017/18</th>
<th>2018/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Delivery - Salaries (Note 1)</td>
<td>21.81</td>
<td>22.38</td>
<td>21.80</td>
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<tr>
<td>External Delivery - Property</td>
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<tr>
<td>External Delivery - Services</td>
<td>26.64</td>
<td>26.68</td>
<td>24.64</td>
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<tr>
<td><strong>Total Operating Cost</strong></td>
<td>51.05</td>
<td>52.02</td>
<td>49.12</td>
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