

The Scottish Tourism Alliance Policy Agenda
for the 2016 - 2020 Scottish Government

A TOURISM INDUSTRY MANIFESTO FOR
GROWTH & COMPETITIVENESS TOWARDS 2020

COMPETITIVENESS SUSTAINABLE GROWTH & INVESTMENT

TOURISM IN NUMBERS



Tourism provides
211,200
jobs in Scotland
(9% of the workforce)

EMPLOYMENT



13,480
registered tourism
enterprises
in Scotland, of which 55%
have less than four
employees

BUSINESSES



Tourism brings in an estimated
£4.4bn
a year in direct spend from overnight visitors of which £1.72bn comes from international visitors, representing valuable export income.

EXPORT REVENUE 2014



The national tourism strategy mission is to grow the value of overnight visitor spend in real terms from the 2011 baseline of

£4.4bn by at least **£1bn**
by 2020

TOURISM SCOTLAND 2020

Spend by **leisure day trippers** brings an additional

£5bn
per year into Scotland's economy.

TOURISM SCOTLAND 2020

Scottish Government
has identified

TOURISM
as a key growth sector.

THE SCOTTISH TOURISM ALLIANCE

INTRODUCTION

The Scottish Tourism Alliance (STA) is the acknowledged Industry Leadership Group for tourism and the leading voice for the tourism sector in Scotland. The STA Vision is *“to lead an engaged and united Scottish tourism industry in the delivery of an ambitious shared strategy for growth”*.

As an independent trade body comprising over 250 trade associations, businesses, destination groups and other organisations with an interest in tourism, the STA represents and connects with over 75% of the tourism industry in Scotland.

Through its role as the Tourism Leadership Group, the STA is the guardian of the national tourism strategy: Tourism Scotland 2020 on behalf of the industry and Government.

The national strategy vision for 2020 and beyond is to make Scotland *“a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people”*.

The industry is committed to working with Scottish Government and its agencies to deliver this strategy. It is a collaborative and partnership approach.

As the sector comes together, we are able to speak with a clearer and more unified voice, and this clarity is helping to identify the key opportunities which will drive the success of this important sector.

Central to this message is ensuring Scotland’s tourism industry is competitive, at both UK and international levels. Scotland is a mature destination, with a long-established reputation for welcoming visitors, however we are expensive. International competition is increasingly fierce and as a small country, we need to ensure that Scotland remains attractive, accessible and affordable and offers visitors a consistently high quality experience.

The tourism industry has come together under Tourism Scotland 2020 and is committed to working collaboratively with Government to deliver the growth ambition.

The Scottish Tourism Policy Agenda for a future Scottish Government has been prepared by the Scottish Tourism Alliance, in consultation with the STA Council, a committee comprising over 30 sector bodies.

This document outlines how Scottish Government can support the tourism industry by driving growth, creating a sector better able to compete on the international stage, increasing the support for marketing, innovation and enterprise.

TOURISM SCOTLAND 2020



In supporting the industry's commitment and ambition to drive growth through the delivery of Tourism Scotland 2020, the Scottish Tourism Alliance, on behalf of the Scottish tourism industry, asks a future Scottish Government to:

Minimise the burden of regulation and associated costs

Recognise the essential role of marketing Scotland at UK and international levels

Provide sustainable support to enable industry to deliver 'high quality, value for money and memorable experiences'

Support the growth of a skilled, professional and inclusive tourism workforce

Continue investment in Scotland's digital infrastructure to accelerate growth

Align transport policies, practice and taxation with the industry's tourism strategy

Minimise the burden of regulation and associated costs, by:

- Reviewing and ultimately reducing the costs (direct and unintended) of regulation on tourism businesses
- Ensuring that regulations are interpreted, implemented and enforced in a consistent manner in all parts of the country
- Guaranteeing to review the current business rates model with the aim of reducing the level of taxation and give commitment to introduce a fairer system that flexes with the wider economy
- Continuing to support the Small Business Bonus Scheme
- Reducing Planning Application Fees to support and encourage new investment and reinvestment
- Giving assurance that there will be no further taxation or levy imposed on the visitor at local or national level
- Committing to consult with the Scottish Tourism Alliance prior to changes to future tourism policy, taxation or planned discussions with UK Government that could negatively affect the competitiveness of the tourism sector in Scotland



Recognise the essential role of marketing Scotland at UK and international levels, by:

- Protecting and growing the VisitScotland marketing budget to increase the number of international and UK visitors to Scotland
- Empowering and supporting sectoral and destination organisations to market effectively



Provide sustainable support to enable industry to deliver 'high quality, value for money and memorable experiences', by:

- Increasing sustainable support to destinations (rural and cities) and tourism sector groups to maximise competitiveness, strengthen leadership and enable growth of the sector
- Maintaining and increasing investment in Scottish Enterprise and Highlands and Islands Enterprise to support enterprise, innovation and leadership in the tourism sector
- Encouraging innovation within the tourism industry by the provision of robust, timely and consistent market intelligence
- Working with industry to research and develop the concept of a Tourism Investment Bank in line with the Scottish Investment Bank



Support the growth of a skilled, professional and inclusive tourism workforce, by:

- Ensuring appropriate funding and support is available to deliver the priorities agreed in the Tourism Skills Investment Plan which is aligned to Tourism Scotland 2020
- Increasing the range and funding support for relevant tourism vocational training courses
- Ensuring that tourism's position as a key economic sector is included in all stages of Scotland's education system, in particular within the Curriculum for Excellence, and that the skills needed by the industry, such as languages and digital and communication skills, are being met
- Working with industry to champion tourism as a 'career of choice'

Continue investment in Scotland's digital infrastructure to accelerate growth, by:

- Defining a clear timescale to deliver mobile and broadband connectivity throughout Scotland that meets visitor and industry expectations (now and in the future)
- Delivering the vision of Scotland as 'a world class digital nation by 2020'



Align transport policies, practice and taxation with the industry's tourism strategy, by:

- Honouring the commitment to reduce Air Passenger Duty (APD) by a minimum of 50% by April 2018, and deliver earlier implementation if possible
- Giving assurance that any reduction in APD will not prompt the introduction of another form of tax on tourists or tourism businesses
- Continuing engagement and consultation with the tourism industry on future transport policy
- Providing immediate investment to improve the reliability of the existing fleet, and procuring additional fleet to ensure capacity can support future economic growth
- Sustaining focus and investment to provide a better connected transport network for visitors, including smart ticketing across the network





V I S I O N

“Scotland will be a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people.”

The growth and success of Scottish tourism is dependent on everyone in the sector, including Scottish Government and public agencies, working together towards this common vision.

TOURISM IS EVERYONE'S BUSINESS

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