Economy, Energy and Tourism Committee

Remit and membership

Remit:

The remit of the Committee is to consider and report on the Scottish economy, enterprise, energy, tourism and renewables and all other matters within the responsibility of the Cabinet Secretary for Finance, Employment and Sustainable Growth apart from those covered by the remit of the Local Government and Regeneration Committee and matters relating to the Cities Strategy falling within the responsibility of the Cabinet Secretary for Health, Wellbeing and Cities Strategy.

Membership:

Chic Brodie
Murdo Fraser (Convener)
Rhoda Grant
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Mike MacKenzie
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Committee Clerking Team:

Clerk to the Committee
Stephen Imrie

Senior Assistant Clerk
Joanna Hardy

Assistant Clerk
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Committee Assistant
Vikki Little
The Committee reports to the Parliament as follows—

INTRODUCTION

1. This report sets out the Economy, Energy and Tourism Committee’s findings in relation to a one-off evidence session to examine some of the issues currently affecting Scottish tourism. The session was organised to provide a forum for an initial look at the state of Scottish tourism at the start of this new parliamentary term. Of particular interest, was the impact of the current economic downturn on revenue generated in the sector and whether the target/ambition of increasing revenue could be met.

2. In 2006, the Scottish Government's tourism strategy *The Next Decade – A Tourism Framework for Change*¹ outlined a target/ambition for the Scottish tourism industry. This states—

   "Our ambition is to keep pace with global trends over the next 10 years - if we do this we will achieve 50% revenue growth (in real terms)."² This target uses the revenue figures for 2005 as the baseline.

3. To assist with its initial review, the Committee sought the views of industry practitioners, local authorities and regional tourism development bodies and tourism agencies. A one off evidence session was held on 23 November 2011 when the Committee took evidence from:

   - Norman Springford, Chief Executive, APEX Hotels;
   - Gavin Ellis, Owner, Knockomie Hotel;
   - Scott Taylor, Chief Executive, Glasgow City Marketing Bureau;
   - Alan Rankin, Chief Executive, Aviemore and Cairngorms Destination Management Ltd;
   - Lucy Bird, Chief Executive, Marketing Edinburgh Ltd;
   - Dr Mike Cantley, Chairman, and Malcolm Roughead, Chief Executive, VisitScotland;

• Dr Lesley Sawers, Chair, and Jane Gotts, Programme Director, BusinessClub Scotland and Willie MacLeod, Executive Director, Scottish Tourism Forum.

4. The Committee thanks those who gave evidence.

5. This report represents our conclusions and recommendations at this early stage. We intend to keep this subject under review and monitor the progress being made by the Scottish Government, VisitScotland, other relevant public sector bodies and the private sector in Scotland. Actions taken in this parliamentary session will, as we outline below, be critical in terms of the ability to meet the 50% revenue growth target set for this sector.
KEY ISSUES RAISED IN EVIDENCE

Achieving an increase of 50% revenue growth from tourism by 2015

6. In 2006, the Scottish Government’s Tourism Framework for Change stated that—

“Despite little growth during 2001-2003 because of 9/11 and SARS, tourism bounced back across the world in 2004 with 10% growth. The World Tourism Organisation expects global growth to run at 4-5% a year long term. In Scotland, tourism is also growing, particularly from overseas markets. Hotel room occupancy is at record levels, and tourism is now one of Scotland’s most vibrant sectors, helped by an explosion of visitors from European countries”.3

7. The 50% target/ambition set in 2005, prior to the current economic downturn, was based on the World Tourism Organisation world growth forecast, which was an expected growth of 4% per annum.

8. In evidence to the Committee, Malcolm Roughead, Chief Executive of VisitScotland, describes the 50% target as “an ambition rather than a target” and stated that—

“it is realistic to say the 50% target will not be achieved. Clearly, when it was set about five years ago, conditions were different. It would be naïve to expect that in the next three to four years we would see an increase of 50%”.4

9. Conversely, in his evidence to the Committee during its scrutiny of the Draft Budget 2012-13, John Swinney, Cabinet Secretary for Finance, Employment and Sustainable Growth, stated that “although the target might be a challenge and not achievable, Governments should not run around changing their targets at the first sign of trouble”.5 He said—

“[...] that most recent data show that, in the first half of 2011 compared with the first 6 months of 2010, there has been a 6% increase in domestic tourism to Scotland and a 13% increase in domestic tourism expenditure. The combined figures for domestic and international visitors for the first six months of the year are positive, with a 4% growth in visitor numbers and a 3% increase in spend compared with last year”.6

10. According to a recent GB wide survey, the number of visitors to Scotland rose by 8% in the first nine months of last year (2011) as staycations grew in popularity, according to new figures.7 However, a separate Office for National Statistics (ONS) survey showed a 4% fall in the number of international visitors in

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7 Great Britain Tourism Survey, January 2012.
the first three quarters.\textsuperscript{8} In terms of expenditure, the GB wide survey stated that spending by visitors from the rest of Britain to Scotland rose by 21\% year-on-year to about £2.3bn, while expenditure by overseas tourists fell by 6\% to just over £1.1bn.\textsuperscript{9} In essence, these surveys show the rise of the staycation and the continued challenges of attracting visitors from overseas.

11. The Committee heard a range of views on whether the 50\% target/ambition would be met given the current economic climate. Norman Springford, Chief Executive of Apex Hotels told the Committee that the figure was—

“a historical aspiration, if you wish, rather than a hard-and-fast target. The world has moved on and the global economy has clearly changed. The target of 50 per cent growth by 2015 is now historical and, if realism kicks in, achieving it is unlikely. That is not to say that the tourism industry and VisitScotland cannot have such a target. We need something to aim for and whether we choose 50 per cent, 100 per cent or 20 per cent does not matter.”\textsuperscript{10}

12. Opinion on the achievability of the target was varied amongst other witnesses, with Scott Taylor, Chief Executive of the Glasgow City Marketing Bureau declaring—

“A 50\% increase is still our ambition. We should not shy away from that target; we should be measured on it and aim to achieve it”.\textsuperscript{11}

whilst Lucy Bird, Chief Executive of Marketing Edinburgh Ltd stated that—

“I think that a 50 per cent increase is a very high target. We have a long way to go.”\textsuperscript{12}

Collection of statistics

13. The Committee heard evidence from industry practitioners that the statistics which are currently relied upon are being produced from a variety of different sources, such as Office of National Statistics, VisitScotland and Tourism Intelligence Scotland as well as from private sources such as Deloitte, PFK and Lynn Jones Research.

14. Scott Taylor of Glasgow City’s Marketing Bureau told the Committee that not being able to access reliable and consistent Scotland-wide data was causing problems for the tourism industry. He said—

\textsuperscript{10} Economy, Energy and Tourism Committee, Official Report, 23 November 2011, Col 541.
\textsuperscript{11} Economy, Energy and Tourism Committee, Official Report, 23 November 2011, Col 575.
\textsuperscript{12} Economy, Energy and Tourism Committee, Official Report, 23 November 2011, Col 575.
“We face a real challenge in understanding the volume and value of tourism in Scotland. A revision of the funding level to make much more substantive funding available to support the information that we get would be useful.”\textsuperscript{13}

15. The Committee also heard that the collection of statistics at a UK level is compromised, which makes it very difficult for VisitScotland to compare yearly like for like figures. Evidence suggests that VisitScotland and others are not gathering the right information to allow accurate assessment of what has happened in the past.

Skills, education and career opportunities

16. The Committee heard evidence of the continued perception that working for the hospitality sector is one of low pay, long hours and a job rather than a career. We were pleased to hear from some industry practitioners that they were taking steps to address this issue.

17. Evidence we took from those in the hotel industry showed good examples of how they are working more closely with colleges and universities. Apex Hotels Group have a programme with Napier University whereby they offer training modules for university students at the Group’s cost, whilst Gavin Ellis of the Knockomie Hotel works closely with Moray College to offer improved opportunities for some of the College’s students.

18. On the issue of pay, Gavin Ellis told the Committee that—

“Our industry competes well in the marketplace. We have to do that. Tesco, Sainsbury’s and all the other supermarkets are competing for the same staff and we have to compete on an equal basis, although we can probably offer people more career aspects. What you describe happened yesterday; it is not the current reality. The minimum wage sorted that one out for starters.

Would we like to pay our staff more? If the customer paid more, we might be able to do that, but there is a market reality. Many people have dreams about pay scales, but the reality is that it is a matter of what the market can afford.”\textsuperscript{14}

19. Norman Springford told the Committee that—

“Although there is a national minimum wage, which we clearly abide by, and we tend to aim our remuneration at the national living wage, quite a large number of management employees in the hospitality industry who work more than 48 hours a week—and expect to do so—opt out. Saying that is not a source of pride for me, but that is the reality.”\textsuperscript{15}

20. One of the challenges raised by one of the witnesses to the Committee was that of the difficulty in changing the attitude of possible employees. Gavin Ellis of

the Knockomie Hotel highlighted a recent attempt to hire a new employee who, when offered a post, said “I’ll come to your job, but won’t work on Friday or Saturday”.16

Infrastructure and connectivity

21. One of the key selling points for any country and its ability to attract tourists is the quality of its transport infrastructure and its connectivity, enabling the visitor to be able to move around as freely as possible. During our evidence session, the Committee heard that improvements needed to be made in Scotland in this respect.

22. Gavin Ellis of the Knockomie Hotel told the Committee that there needed to be investment and change to roads, rail and air routes. He said—

“Over a generation, we will change, but we could change more quickly if there were fundamental infrastructure changes, such as those needed on the A9 and investment in rail transport to the north. The trains from Inverness to Edinburgh and Glasgow are pedantically slow. If they were faster, we could grow a lot faster and therefore contribute more to the economy.”17

And that—

“we need connectivity with the south through fast trains and airlines that connect. The Heathrow connection is under threat.”18

23. The need to ensure that “infrastructure is brought up to a level that meets 21st century market standards”19 was also stressed to the Committee by Lucy Bird, Chief Executive of Destination Edinburgh.

24. Another issue which was having a negative impact on tourism was the lack of connectivity and the proposed timescale for change. Lucy Bird stated that “there is an opportunity to ensure that the connectivity routes to Scotland—the air, rail and road links—are as speedy and good as they can be”.20 For Gavin Ellis, connectivity with airports in the South East of England was key. He said—

“We must concentrate on connectivity between us and England. I believe from conversations that I have had that we are losing our strong connectivity with Heathrow. We should worry about that a lot.”21

25. For others, such as Alan Rankin, Chief Executive of Aviemore and Cairngorms Destination Management Ltd, telecommunications infrastructure was the challenge and he cited the problem of the lack of a mobile signal in the Highlands and between Perth and Inverness which meant that “the Highland

The economy is massively disadvantaged\textsuperscript{22} in terms of the tourist’s ability to gain access to information or make bookings on the internet or via the mobile phone network. He noted that the current roll out deadlines for broadband are 2016 and 2017, but by then, in his view, “The world will have moved on by then and we will need 4G.”\textsuperscript{23}

**Partnership working and collaboration**

26. The Committee heard evidence of improving working relationships between the public and private sectors. A good example of this is the partnership approach taken by the Cairngorms Business Partnership which has worked closely with VisitScotland to successfully secure growth funding. It works in partnership with five local authorities, two enterprise agencies, the Cairngorms National Park Authority and VisitScotland, looking not only at tourism but at wider economic issues.

27. However, Alan Rankin was also critical of the need for a joined up strategy across Scotland and not just in localised areas. He stated—

“… we do not have a coherent destination development strategy. With our own areas of expertise and product areas, we each have a part to play in economic recovery, but we need more joined-up thinking and a destination development strategy for sequencing how VisitScotland attracts people to the country so that on-going work in each of the destinations can be linked. That work should retain its local flavour and the local businesses must buy into the strategy, but it should be integrated and joined up, which it is not.”\textsuperscript{24}

**Access to finance and investment**

28. Due to the current economic downturn, the Committee is aware of the difficulties faced by businesses in sourcing funding from banks.

29. Witnesses commented that the business barometer, which records businesses’ responses to the access to credit issue shows this issue remains “a significant challenge.”\textsuperscript{25} Other witnesses stated that “some banks are constricted by their own working practices” and that their lending criteria “could be more flexible than they are at present.”\textsuperscript{26}

30. One of the manifestations of the challenge caused by restricted access to capital is a decline in construction of new hotels and leisure facilities, as well as declining levels of investment in investments in improving the quality of the existing stock.

Making the most of opportunities from major event tourism in the coming years

31. Over the next 3 years, there a number of high-profile international events to be held in Scotland and the rest of the UK. These include the London Olympics later in 2012, the Glasgow Commonwealth Games in 2014, the Ryder Cup in 2014 and Homecoming also in 2014. The Committee heard that these events provide challenges and opportunities for the tourism sector in Scotland.

32. VisitScotland’s Winning Years strategy urges all those involved in the tourism industry to maximise on major events over the next few years. It highlights 8 events between 2012-2014 including those mentioned above.

33. VisitScotland has made much of its Winning Years strategy, but despite evidence to the Committee in previous Budget sessions and to this inquiry, there is limited detail as to what the strategy is or what it aims to deliver. In a written submission received by the Committee during the Budget process, VisitScotland stated that the priorities for the Winning Years would be as follows—

“There will be a continuation of the successful “Surprise Yourself” campaign and a focus on the big seven events - The 2012 Olympics, the Disney-Pixar film Brave, the next focus years - Creative Scotland in 2012 and Natural Scotland in 2013 and then of course 2014 with The Commonwealth Games, The 2014 Ryder Cup and Homecoming Scotland.

Focus on attracting major international events to Scotland will continue with recent wins for world championships in gymnastics and orienteering excellent examples of how we are delivering legacy events for the country post-2014. And business tourism will be boosted through the development of the Conference Bid Fund.

Partnership working will continue across business and with other public sector agencies to bring more investment in key areas of capital projects, transport, visitor access and to attract the next generation into a career in tourism.

There will also be continued support for businesses through helping them with routes to market and funding their marketing activity through the VisitScotland Growth Fund.”

34. The Glasgow Commonwealth Games 2014, in particular, will have a major economic impact for businesses in the area, beyond tourism business that will benefit from the organisation of the Games itself. Some of the witnesses giving evidence to the Committee therefore highlighted the importance of community benefit clauses. As BusinessClub Scotland indicated, this means that 10% of the contract value of major infrastructure projects must be able to demonstrate a community benefit. This approach, according to its representatives, “has led to new jobs and new skills, particularly for people who are out of work.”

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35. In Glasgow, the new Scottish Hydro arena will have a capacity of 12,500 people. Although not being built specifically for the Commonwealth Games 2014, it will be able to offer significant capacity. Following the Games, this arena will be used for other sporting events and to attract business tourism through conferences and conventions.

36. Overall, the Committee noted that 80% of contracts for providing infrastructure to support the 2014 Commonwealth Games in Glasgow have been awarded to Scottish companies. Dr Lesley Sawers hoped that through BusinessClub Scotland, “Scottish businesses can get expertise, win contracts and get a foothold in the market through 2012, 2014 and the Ryder cup that will enable them to compete successfully and to work with SDI and the Scottish Government to win contracts in Rio and Qatar and for other major global events.”

37. The Committee was also interested in whether the London Olympics 2012 could have a negative impact on tourism in Scotland and wanted to know what strategies were in place to minimise this and to make the most of any opportunities it may afford.

38. Dr Lesley Sawers, Chief Executive of BusinessClub Scotland, told the Committee that Scottish Enterprise, the Scottish Government and business organisations are doing a lot of work to profile and position Scotland as a great place and that her organisation intended to showcase team Scotland in London during the Olympics. Recent press coverage, has suggested that £7 billion worth of contracts for businesses have been issued for the London 2012 Olympics. According to figures from Scottish Enterprise, more than 4200 Scottish companies registered to compete for Games-related supply chain opportunities and that, to date, 117 Scottish companies have secured 158 contracts. The agency says there are other contracts which will have been awarded outwith this and a conservative estimate for the value of the contracts won by Scottish businesses is in the order of "tens of millions of pounds".

39. Among the major winners has been Aberdeen-based FirstGroup, which secured the contract to run bus services for spectators at the Olympics worth about £20m and Glasgow-based temporary power supply company Aggreko, which won a £37m contract.

40. Mike Cantlay, Chairman of VisitScotland, agreed that for tourism in Scotland, the London Olympics 2012 provided “a good example of an opportunity” but that “we could say that it is a threat too” to tourism in Scotland. He emphasised the need for VisitScotland to be involved from the outset to promote the year of creative Scotland as an alternative to going to the Olympics.

41. He outlined 4 specific markets that VisitScotland wish to exploit in an effort to draw people to Scotland during the Olympic Games next year. These are:

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29 Sunday Herald, What will the Olympics do for Scotland? 8 January 2012.
• Working with independent and group travel operators to add a trip to Scotland as part of their visit;
• Encouraging those who would normally visit London but find it full or expensive to try Scotland as an alternative;
• Targeting people from London and the North East to get out of the city during the Olympics and visit Scotland; and
• The business as usual market.

42. Malcolm Roughead of VisitScotland said—

“The year of creative Scotland [2012] is a wonderful opportunity, because it is a counterpoint to the world’s spotlight being on sport. That allows people who are perhaps not desperately keen on going to the Olympics to come and experience of Scotland’s rich cultural tapestry.”31

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CONCLUSIONS AND RECOMMENDATIONS

43. According to the main industry trade association – the Scottish Tourism Forum - Scottish tourism was worth, in expenditure terms, just over £4.2 billion.\textsuperscript{32} Furthermore, the industry employed around 215,000 people, or about 8\% of the total number of people employed in Scotland.\textsuperscript{33} In some parts of Scotland, such as the Highlands and Islands and Perthshire, the proportion of people employed in the industry relative to employment rates generally rises much higher, to as much as one-in-eight. As such, tourism is a critically important sector of the Scottish economy and more so in certain areas of the country.

Growth targets and tourism statistics

44. To stimulate growth, the previous Scottish Government chose to continue with the strategy set out in the \textit{Tourism Framework for Change} document\textsuperscript{34} and to update and refresh this. A central component of the strategy is an analysis which indicates that the Scottish Government and the tourism industry have an “ambition” of increasing gross tourism revenues by 50\% (in real terms) by 2015, using the revenue figures for 2005 as the baseline.\textsuperscript{35}

45. The Committee has heard evidence from a range of witnesses on the 50\% target but there appeared to be no consensus as to whether or not it remains either realistic or achievable. It was clear, however, that the Cabinet Secretary for Finance, Employment and Sustainable Growth believes that the target should remain and all efforts should be made to achieve it.

46. The Committee welcomes the recent news of an increase in domestic tourism trips between January and September 2011 of 10.3\% compared to the same period in 2010.\textsuperscript{36} We also note, however, the recent surveys highlighting the fall in the numbers of international visitors to Scotland and declining expenditure levels.

47. The Committee welcomes the ambition of setting and trying to achieve a high tourism growth target but notes the evidence from witnesses that the 50\% target is not considered achievable. We are concerned that the Cabinet Secretary and the Chief Executive of our main tourism agency for Scotland have differing views on the achievability of the 50\% growth target. We recommend that the situation is kept under review and that VisitScotland provide the Committee with yearly statements on the progress being made towards meeting the target and, should this look less likely, supply us with details of what steps it plans to take to address any shortfall in progress.

48. Evidence received by the Committee would appear to show continued dissatisfaction amongst industry practitioners and others that we still do not have

\textsuperscript{32} Scotti\hspace{1em}sh Tourism Forum website: http://www.stforum.co.uk/tourism_in_scotland/
\textsuperscript{33} Scotti\hspace{1em}sh Tourism Forum website: http://www.stforum.co.uk/tourism_in_scotland/
\textsuperscript{34} Scottish Executive (March 2006), \textit{Tourism Framework for Change}. Scottish Executive. Available at: http://www.scotland.gov.uk/Publications/2006/03/03145848/0
\textsuperscript{35} Scottish Executive (March 2006), \textit{Tourism Framework for Change}, p15.
\textsuperscript{36} VisitScotland
access in Scotland to reliable and up-to-date tourism statistics for the Scottish market. The Committee recommends that the Scottish Government carries out a feasibility study on what would be involved in establishing a Scottish-based, centralised source of information and statistical collection which would assist in better understanding trends in the tourism sector and, in particular, could be a tool for monitoring progress towards the targets for growth.

Education, skills and training

49. On-the-job training is often provided by those operating in the tourism sector in addition to the education and training provided by colleges and universities. A strong working relationship between the tourism industry and education and training providers is vital to ensure well trained, highly qualified staff are to be found in all aspects of the Scottish tourism industry. The Committee is therefore pleased to hear evidence suggesting that connectivity between these organisations is improving. However, there does appear to be a desire from those within the industry to place more emphasis on the work experience aspect of education courses, with placements extended to beyond the normal one week.

50. The Committee is encouraged by the evidence received on the increased engagement between the tourism sector and schools, colleges and universities and would like to see this continue. We would like to see current training and tourism courses that are fit for purpose, with those who work in the sector becoming more involved in the creation and delivery of these courses. The Committee feels that longer education and work experience placements at secondary school and as part of degree courses is a good development which could result in increased skills and a more realistic expectation amongst those who would wish to seek employment in the tourism sector.

51. The Committee notes that, following its predecessor’s tourism inquiry, the Scottish Government undertook a review of college and university provision for the tourism sector. We are not sure whether this has yet delivered the decluttering and rationalisation of provision that was called for at the time. For us, the provision of education, skills and training in the sector has to be demand-led, enjoy the support of the industry and offer a smaller number of industry-approved and government-certified courses which are delivered by a limited number of centres with a geographic spread in Scotland. We, like our predecessor, are also keen to see the establishment of a small number of hotel schools along the lines of the high-quality models used elsewhere in Europe, with greater emphasis on craft and technical skills. We recommend that the Scottish Government provides us with an update on the progress being made by the Review Group formed in 2007/8 and tasked with an overhaul of service provision.

52. We also welcome the evidence we heard from two employers in the hotel sector on pay and conditions and recommend that VisitScotland and the Scottish Government continues to work with employers and the STUC to improve issues in this area.
Infrastructure (transport, telecommunications etc.)

53. The Committee welcomes the Scottish Government’s consideration of the provision of a high-speed rail network for Scotland, dualling of major Scottish roads and the delivery of faster internet access. **We recommend that Scottish Ministers provide further information relating to these projects to the Committee for its consideration and would urge that, given the fast moving nature of technological improvements, consideration be made to bringing forward the timetable for implementation.**

Finance issues and ease of investment

54. Planning problems, building control issues and the difficult environment for inward investment in such a relatively small country all impact on our ability to raise our game in terms of quality, capacity and new product. This simply has to change. To drive this vital sector of the economy we must work to catalyse indigenous as well as international investment.

55. Equally important is the evidence we have heard from the tourism industry that access to finance for investment purposes is still an issue for some in this sector and we would encourage the Scottish Government to act where possible in encouraging more flexibility in bank lending criteria to allow the tourism and conference markets in Scotland to grow.

Partnership working

56. We are heartened by the clear examples provided to us of strong relationships working in tourism between public and private sector businesses. **The Committee would encourage greater partnership working and recommend that examples of good practice be examined by VisitScotland and be replicated throughout the tourism industry in Scotland to achieve consistency.**

57. We detect a more open environment from VisitScotland in recent years to embrace the idea of more localised tourism partnerships, such as destination management organisations (DMOs), being established. We urge VisitScotland to carry on in this vein and ensure that it embraces DMOs, city marketing bodies etc. However, there does need to be better co-ordination at a national level between VisitScotland and these regional or local initiatives.

Future opportunities

58. The Committee welcomes VisitScotland’s Winning Years strategy as a way for tourism businesses to maximise the impact of, and legacy from, major events in the period 2012 to 2015. We would like to see, however, more detail on what the strategy and objectives are and how VisitScotland hopes to measure the achievability of these aims. The Committee believes that Scotland should have a diverse tourism strategy which is not too focussed on urban areas and major events and includes rural, niche markets and year-round tourism.
59. The Committee agrees that to maximise the tourism opportunities for Scotland during the London Olympics 2012, Commonwealth Games 2014 etc. there needs to be a “Team Scotland” approach, co-ordinated by VisitScotland, and would urge all those within tourism sector to get involved. The Committee will continue to seek detailed information from those in the tourism sector on the progress of the strategies adopted.

60. The importance of having a long lasting legacy following major events in Scotland is of vital importance. The Committee welcomed the evidence we heard that suggested these legacies were already being considered (e.g. the use of more Community benefit clauses in contracts). We want to build on the momentum started by major events as we consider this to be of vital importance to the regeneration of local communities.

61. The Committee shares the view that forthcoming major events provide a unique opportunity to showcase Scotland’s tourism sector and understands the importance of both maximising opportunities and creating a legacy for communities and businesses from these one-off events. It welcomes the work done by the tourism agencies and would appreciate yearly progress updates.