Introduction to VisitScotland and the Visitor Economy

The visitor economy generates £11 billion of economic activity, with almost 15 million visitors spending £9 billion, which in turn supports 217,000 jobs.

A strong visitor economy helps to position Scotland on the world stage, whilst the economic impact of the visitor spend spreads out from the traditional component parts of the tourism industry into other sectors such as arts and crafts, food and drink, cultural activities, sports events, activities and retail.

Reflecting the ongoing success of the sector tourism Gross Value Added (GVA) associated with tourism has increased by 42% since 2008, with more to come as VisitScotland, working with local authority partners, has identified through the National Tourism Development Framework £16 billion of investment in tourism and tourism related projects.

As Scotland’s national tourism organisation, VisitScotland supports the continued growth of the visitor economy through our principal activities.

These involve:
- the marketing of Scotland to all parts of the world (including Scotland and the rest of the United Kingdom) to attract visitors;
- providing information and inspiration to visitors and potential visitors so that they derive the best experience from a visit to Scotland;
- providing quality assurance to visitors and quality advice to industry; working with partners to assist the tourism industry in not only meeting but exceeding visitors’ expectations;
- and the development of a portfolio of events that deliver impact and an international profile for Scotland by establishing Scotland as the perfect stage for events.

The role of Scotland’s Island to tourism and its impact on Island economies

Scotland’s Islands play an important part in the country’s ability to attract visitors from around the world. Our diverse islands provide unique landscapes, culture, heritage and lifestyles, and they support the attractiveness of Scotland as a place to live, work, visit and study.

Tourism continues to create new jobs and opportunities on Scotland’s islands, often where few other industries do. The value of tourism to the islands, the number of trips, the percentage of workforce employed and recent growth in the industry help sustain our island communities.
The following table sets out the positive impact of tourism to the larger island groups in Scotland.

<table>
<thead>
<tr>
<th>Local Authority Area</th>
<th>Sustainable Tourism Employment</th>
<th>Sustainable Tourism GVA (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eilean Siar</td>
<td>1,000</td>
<td>19.4</td>
</tr>
<tr>
<td>Orkney</td>
<td>1,100</td>
<td>26.8</td>
</tr>
<tr>
<td>Shetland</td>
<td>1,200</td>
<td>30.4</td>
</tr>
</tbody>
</table>

Tourism is a key driver for Scotland’s islands. Recognising the importance of this sector in the Islands Bill will help drive the success of all our offshore destinations, ensuring their sustainability, opportunities for extending the season and providing facilities and amenities to meet the demands of our current and future visitors.

1. The Bill creates a duty to publish a national islands plan and lay it before the Scottish Parliament. What are your views on this provision?

VisitScotland believes that the publication of a national islands plan is an important step in continuing to develop the opportunities and tourism potential of our islands. Whilst remoteness is a key draw for many visitors, it is vital that our island’s benefit from better connectivity with the mainland.

Distance should not be a barrier to growing tourism and a plan needs to take into account the need to enable visitors from across the world to reach our islands, through improved connectivity and once there, facilities that will meet visitors’ expectations. In turn ensuring a growth in visitor expenditure will support the aims and ambitions of Local Outcome Improvement Plans and sustaining island communities.

2. The Bill will require Scottish Ministers and certain Scottish public authorities to prepare island impact assessments. Do you agree with this provision? How do you think it should work in practice?

VisitScotland would welcome a requirement for island impact assessments to be undertaken. This will help to ensure that the individual needs and requirements of island were taken into account. The individual nature of Scotland’s islands requires this.

Key elements which should be addressed in any assessment are investment, jobs, infrastructure, accommodation and skills. Each is interlinked and essential to retaining thriving communities and, in turn, a growing visitor economy. Assessments should also seek to tackle wage disparities between islands and the mainland, particularly given the higher costs associated with island life. In doing so young people can hopefully be encouraged to stay, or move to islands, working in a vibrant tourism sector or starting tourism businesses of their own.
Islands have seen or will begin to see the impact of Road Equivalent Tariff. This is a prime example of the benefits that can be accrued from treating island communities in the same way as our mainland counterparts.

3. The Bill proposes to protect the Scottish Parliamentary constituency boundary of Na h-Eileanan an Iar (the Western Isles) from change. Do you agree with this?

We have no comment to make regarding question 3.

4. The Bill proposes to make an exception to the rules for local government electoral wards to allow areas with inhabited islands to return 1 or 2 members (instead of the usual 3 or 4). What are your views on the proposal?

We have no comment to make regarding question 4.

5. The Bill will provide a regulation—making power for the Scottish Ministers to create a marine licensing scheme for coastal waters. Do you agree with this power? Do you have any comments on how is should be used?

Scotland has a National Marine Plan (the most advanced in the UK) which addresses potential competition for space in the marine environment and conflicts of interest. It covers commercial fisheries, aquaculture, offshore renewable energy and mineral extraction as well as tourism, recreation and leisure.

In addition, such a development can benefit Awaken the Giant: A Strategic Framework for Scotland’s Marine Tourism Sector, with its vision to make Scotland a marine tourism destination of first choice.

Opportunities for regionally devolved licensing for diverse activities supporting both strategies are welcomed, within a system that recognises the needs of island communities.

6. Does the Bill achieve its aims and are you in favour overall? Is there anything else that you feel should be included or excluded from the Bill?

VisitScotland supports the Bill, and the national tourism organisation looks forward to its publication and implementation.

It is important to recognise the opportunities which the Bill can achieve for Scotland’s islands. The Bill should deliver a renaissance for island communities, assisting their future growth. It is important that the Bill recognises the individual nature of our islands and recognises that islands operate as distinct economies in their own right. Unlike many parts of the Scotland, islands often do not see a ripple effect spreading from significant investments in the mainland, or indeed from island to island. The Bill can help create a new approach to islands, developing an understanding of their distinctive needs and the opportunities on each island, allowing agencies to plan and
respond accordingly. An Islands Bill that encourages that approach would be welcomed.

7. Do you have any comments on the Bill in relation to human rights or equalities?
VisitScotland works to promote equalities and human rights and supports every effort to include these important elements within the Bill.

VisitScotland
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