RURAL ECONOMY AND CONNECTIVITY COMMITTEE

PROPOSED NATIONAL ISLANDS PLAN

SUBMISSION FROM VISIT SCOTLAND

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 207,000 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 2015</th>
<th>Sustainable Tourism GVA 2014 (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eilean Siar</td>
<td>1,100</td>
<td>39.5</td>
</tr>
<tr>
<td>Orkney</td>
<td>1,200</td>
<td>14.2</td>
</tr>
<tr>
<td>Shetland</td>
<td>1,400</td>
<td>21.2</td>
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</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. **Do you think the 13 Strategic Objectives in the proposed National Islands Plan are the right ones to meet the needs of island communities?**

The 13 Strategic Objectives broadly reflect the consultation responses across the island groups and recognises the over-arching issues that the islands face from a tourism perspective.

VisitScotland welcomes the strategic importance of the National Marine Plan and YCW2020 in the document, as well as commitments to more sustainable and less seasonal tourism; and development of food and drink-related tourism products and experiences.

VisitScotland notes that tourism elicited a very low incidence of in-depth discussion, but understands that tourism-related issues are covered by other over-arching economic development objectives.

2. **Are there any issues which have been overlooked in the Strategic Objectives?**

Strategic Objective 1 includes an undertaking to understand the impact of Brexit on islands and island communities. Clarification on the meaning of that would be helpful (i.e. impact of uncertainty so far, given the process has not been concluded).

Objective 3, Transport, with a strong commitment to introducing a fair and equitable solution to the twin issues of cost and capacity for travelling to and from all the island groups.

The Plan could be clearer that the issues are very different in each island group.

The Plan recognises the need to create all-year-round products that incorporate as many islands as possible and mention of the Scottish Islands Passport initiative is welcome. However, this may not be true of islands where “over-tourism” is an issue.

3. **Are there any Strategic Objectives that should be given a higher level of priority within the proposed Plan?**
The Strategic Objectives actively deal with all the major ‘supply-side’ tourism issues we face, such as depopulation, housing, skills, transport and digital connectivity.

4. Do you think the proposed Plan sets out both a clear strategic direction and practical approaches to delivery of the Strategic Objectives?

VisitScotland believes the proposed Plan sets out both a clear strategic direction and practical approaches to delivery of the Strategic Objectives.

5. Do you have any comments on the actions outlined to support effective implementation of the proposed Plan?

The test of deliverability will hinge on the Implementation Strategy, due to be introduced in the spring of next year, and early opportunities for VisitScotland to contribute to local actions will be welcome.

6. Do you think the proposed Plan adheres effectively to its stated principles that it is “fair, integrated, green and inclusive”? If not, how might its adherence to any or all of these principles be improved?

VisitScotland believes the proposed Plan adheres effectively to its stated principles. However, it is important for the Plan to deliver its ‘fair’ principle - that travel cost and capacity to all islands must be fair and equitable.

7. The Islands (Scotland) Act 2018 sets out longer term timescales for Scottish Ministers to report on and review the Plan. Does the proposed Plan have sufficiently clear targets and measurable indicators by which to measure its performance?

The proposed National Islands Plan has sufficiently clear targets and measurable indicators by which to measure its performance.

8. Does the proposed Plan align with the Scottish Government’s renewed focus on climate change issues, following its announcement of a climate change emergency?

Careful consideration needs to be taken when there is the possibility of energy development being at odds with the local drivers for tourism.

Scenery and the natural environment have become the two most important factors for visitors in recent years when choosing a holiday location. It is our view that the importance of this element to tourism in Scotland cannot be underestimated.

Such developments also need to be weighed up with the wishes of the local community.

Looking at the transport sector, there are opportunities to increase the support and pace of measures to reduce the climate impacts arising from the movement of visitors to and within our islands. Visitors heading to islands can experience fewer public transport options, compared to the mainland, and there is a real scope to intensify activity to improve the carbon footprint on routes to and within the islands. It
is crucial that Islands are not left behind as we transition to greener transport, indeed they could be leading the way.

VisitScotland welcomes the strategic importance of the National Marine Plan and YCW2020 in the document, as well as commitments to more sustainable and less seasonal tourism; and development of food and drink-related tourism products and experiences.

9. Does the proposed Plan deliver against the Scottish Government’s own National Performance Framework, and the underpinning Sustainable Development Goals?

The proposed Plan does deliver against the Scottish Government’s own National Performance Framework.