

Infrastructure Commission for Scotland – Initial Call for Evidence

VisitScotland and the Visitor Economy

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 increased sustainable economic growth.

As the lead delivery agency for the visitor economy, VisitScotland focuses 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 are ambitious and 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 work closely with the Scottish Tourism Alliance to contribute to the delivery of Tourism Scotland 2020 and, as part of the Cabinet Secretary for Culture, Tourism, Europe and External Affairs' High Level Tourism Working Group, we consider the future of tourism beyond 2020.

As a Non-Departmental Public Body we 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 work with our sponsor department to ensure tourism is taken into account across all Government policy.

The Visitor Economy is worth £11.3 billion to Scotland each year and supports 206,000 jobs. Scotland currently attracts 15 million visitors each year. VisitScotland is working with industry partners to ensure that Scotland capitalises on the ongoing rise in global tourism which the UNWTO predicts will increase by 3 to 4 percent year-on-year.

The industry is currently preparing a refreshed strategy to take tourism development through to 2030. Key to the success of the strategy is having the correct infrastructure in place to stimulate and support that growth.

Key considerations and future infrastructure needs to support a successful Visitor Economy

1. Transport

Transportation is an integral part of the tourism industry, linking tourists with tourist attractions, activities and generates increased visitor numbers in regions. Generally tourism expands where there are better transportation systems. Parts of Scotland that are underperforming compared to their natural heritage and attractions, in part, suffer from a lack of access.

The road network

It is highly likely that the increase in tourism will put further demands on the country's road network. The dualling of the A9 and the Queensferry Crossing are good examples of where planning is helping to spread the benefits of tourism more widely and more quickly.

VisitScotland is currently promoting the south of Scotland through a £500,000 marketing campaign that is bringing new visitors into the region. A key issue though are the main routes through Dumfries and Galloway – the A77 and the A75. Key trunk roads for Scotland, they are in need of

capacity and safety improvements if they are to carry increased tourist traffic, as well as increased freight.

Other projects to support increased passenger capacity at Aberdeen, Glasgow and Edinburgh Airports should also be considered.

Electric Vehicles

Scotland's visitors are increasingly asking about EVs when planning tours of Scotland. Whilst Scotland is the most successful part of the UK in delivering charging points, the fact remains that provision is still too uncertain for many visitors to undertake a long trip in an EV.

Visitors from key markets in northern Europe, in particular, expect to be able to use renewable sources of energy during their trip to Scotland and this includes the use of EVs. This expectation will rise as other countries move towards the day to day use of EVs. Further investment needs to be considered to help ensure Scotland's continued recognition as a sustainable destination.

Rail capacity and improved journey times

The capacity on Scotland's rail network and journey times are critical factors in helping to attract and to disperse visitors. Success here is less about building new lines and more about delivering an enhanced and reliable existing service.

Plans to increase capacity at Edinburgh Waverley and Glasgow Queen Street will help as these hubs make onward travel simpler and more efficient for visitors. Similarly improvements in rail connectivity between Aberdeen, Dundee and Inverness and the Central Belt should also be a priority allowing more visitors move more easily between Scotland's cities and their surrounding areas.

When future proofing the network must also consider possible HS2 expansion and reduced journey times between London and Edinburgh and Glasgow. This would enable more visitors to travel to Scotland quickly as part of a trip to the UK.

Ferries and marine infrastructure

With around 90 inhabited islands many communities rely on lifeline ferry services. With the introduction of Road Equivalent Tariffs travel to our islands has become a much cheaper option for visitors. This has resulted in capacity issues which have created pressures on some services popular with visitors. Future planning must consider how Scotland's ferry services can be improved to the benefit of local people and visitors alike.

2020 is Scotland's Year of Coasts and Waters and there will be increased interest in the country's marine offer. Future planning should examine how best to preserve and enhance this asset with infrastructure that allows increased access to our marine environment in a sustainable way.

Integrated transit systems

Ultimately Scotland must have smart, integrated and low / zero-carbon mass transit systems if the country is to become a total quality destination; one where visitors' expectations on transport are exceeded. This focus on improved public transport will also assist in reducing private car use and associated CO2 emissions.

2. Supporting communities

What is good for local communities is highly likely to be good for visitors. Infrastructure investment benefits all people, whether settled in, or visiting a destination.

Rural Tourism Infrastructure Fund

VisitScotland is managing the investment of a £6 million package of support from the Scottish Government to alleviate pressures associated with tourism in rural locations. The Rural Tourism Infrastructure Fund is an example of where small infrastructure projects (pathways, car parking, EV charging points and toilets) can help to prevent perceived conflicts of interest between local communities and visitors.

Successful projects deliver an enhanced visitor experience by taking a sustainable approach. They also focus on community capacity building and effective partnerships and collaboration. RTIF represents a successful model and approach to infrastructure development.

Housing

The continued growth of the visitor economy is dependent on tourism businesses having access to a workforce. In many rural locations this is a challenge given the lack of affordable housing which is adding to the depopulation of some of the country's key visitor areas. Without a vibrant and dynamic local community it will be hard for some regions to fully realise the economic and social benefits of tourism. A key consideration for future investment must be to tackle the housing shortage, which can help to ensure that young people remain, and are more likely to settle in, geographically diverse locations.

Regeneration

A catalyst for social and economic change, infrastructure investment projects should reflect the history and dynamics of the local area and communities - place making - and can successfully have tourism at their heart.

Examples include the Kelpies and the V&A Museum, Dundee – both of which are designed to drive increased visitor numbers as part of a wider ambition to regenerate post-industrial areas.

VisitScotland would argue that regeneration infrastructure projects should always involve input from local and national tourism bodies to ensure economic and social opportunities are maximised.

3. Planning

The Tourism Development Framework

VisitScotland has worked with local authority partners to develop this tool to identify and assist with infrastructure projects supporting the growth of the visitor economy.

The Tourism Development Framework for Scotland: role of the planning system in delivering the Visitor Economy, has been created to assist and promote growth in Scotland's visitor economy to 2020.

The primary purpose of this Framework is to:

- Provide guidance to planning authorities to help secure growth in the visitor economy
- Highlight future opportunities for investment and development to all councils and other stakeholders

- Promote actions needed to support growth in a structured and consistent manner to the Scottish planning system.

Additionally, it will help businesses in the tourism industry by focusing on two key parts of the national tourism strategy Tourism Scotland 2020 development strategy:

- Improving the customer journey
- Providing authentic experiences

A refresh of the initial document, first published in July 2013 was undertaken in 2016. This is a resource which can support the work of the Infrastructure Commission for Scotland. Future editions of the Framework are likely to include the identification of where infrastructure is needed, including hotels and attractions.

4. Digital Infrastructure

VisitScotland is a champion of digital improvement across the Visitor Economy, but to ensure success it is essential that the necessary digital infrastructure is in place. All too often the lack of digital connectivity creates a barrier to businesses achieving their economic potential. Whilst access to broadband has now been transformed, mobile coverage remains poor, impacting on the visitor experience and depriving local businesses of the opportunities that come with improved online access. This is an area in need of urgent attention if Scotland's Visitor Economy is to benefit from technology already available in competitor destinations.

VisitScotland
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