



ASSESSMENT OF MANAGEMENT NEEDS AND  
STRATEGIES FOR SCOTLAND

The United Kingdom is a state made up of the historic countries of England, Wales and Scotland, as well as Northern Ireland. All of these countries need to adhere to Visit Britain's "Delivering a Golden Legacy: a growth strategy for inbound tourism 2012-2020." (Visit Britain, 2017)

According to Visit Britain (2017), the strategy aims to attract 40 million international visitors a year, spending £31.5 billion, by 2020. As seen in Appendix 1.1, Britain was the seventh most popular international tourism destination based on international arrivals. "Delivering a Golden Legacy: a growth strategy for inbound tourism 2012-2020" sets out what Britain can do to guarantee that international tourism delivers the largest economic benefit and how marketing and policy purposes can be united. Alongside their new tourism strategy, Visit Britain have been running a four-year marketing programme with the UK Government and a wide range of partners to boost Britain's image overseas. This campaign has been seen to be successful, with £800m in additional visitor spend by overseas visitors in 2015/2016. (Visit Britain, 2017)

Economic growth is a key driver of growth in tourism. China is an example of this, where the market today is worth approximately \$72 billion, and their outbound travel spend has increased 400% the past years. (Visit Britain, 2013).

According to Proon (1993), the general traveller has changed from "old tourist" to "new tourist" where the new tourist is more spontaneous, unpredictable and wants to be different from the crowd. Alongside that, the tourists' motivation has changed from being search for the sun, escapism and just for show to vacation as an extension of life, experience something different and just for the fun of it. Their attitudes and interests have also changed. Please find a more detailed figure in Appendix 1.2. It can be argued that UK has become an increasingly popular tourism destination due to the changes from "old tourist" to "new tourist", as the UK provides a more active holiday where the tourists are experiencing something different with local cuisine, nature and the historical elements spread across the UK.

Department of Culture, Media and Sport (2016) stated that 2015 was a record-breaking year for UK tourism with 36.1 million visits, which is a 5.1% increase from 2014. Please find statistics enclosed in Appendix 1.3. Their Tourism Action Plan sets out how the Government is working to rebalance the sector, boosting jobs and growth across the country. Their 5 key action plans for this are:

- i. The tourism Landscape: Strengthening co-ordination and collaboration
- ii. Skills: Boosting apprenticeships and attracting more people to careers in tourism
- iii. Common sense regulation: Examining the scope for deregulation
- iv. Transport: Make it easier for visitors to explore by rail, bus and coach.
- v. A GREAT Welcome: Driving continuous improvements in the visa service

Even though UK have their regional tourism strategies to adhere to, they are also involved in other strategies and policies. Two of these include the management plan for World Heritage Sites. It is UK Government Policy that each nomination of a new site to UNESCO is accompanied by the World Heritage Site Management Plan to ensure that sites are managed in a sustainable way. According to Historic England (2017), all UK sites have management plans in place, which are viewed on a regular basis. Please find enclosed in Appendix 1.4 the City of Bath World Heritage Site Management Plan 2016-2022.

Another policy that the UK recently adhered to is the Paris Agreement. The Foreign Minister, Boris Johnson, signed the Paris Agreement Pact in London on Thursday 17<sup>th</sup> November 2016. The UK became the 111<sup>th</sup> country to ratify the Paris climate agreement. According to United Nations (2017) the Paris Agreement's central aim is to *"strengthen the global response to the threat of climate change by keeping a global temperature rise this century well below 2 degrees Celsius above pre-industrial levels and to pursue efforts to limit the temperature increase even further to 1.5 degrees Celsius"* Additionally, the agreement aims to strengthen the ability of countries to deal with the effects of climate change. The Paris Agreement entered into force on 4<sup>th</sup> November 2016.

Scotland forms a part of the United Kingdom, and is seen to be one of the most visited places in the United Kingdom, alongside England.

According to the Scottish Government (2017) *"Tourism is everyone's business – everyone in Scotland is an ambassador"*

The tourism sector is of vital importance to the Scottish economy, and Visit Scotland (201) reports that the latest figures indicate total overnight and day visitor expenditure in Scotland was approximately £5 million in 2015, whilst the total visitor number for the same period was 14.8 million. Please find statistics enclosed in Appendix 1.5.

Scotland's National Tourism Strategy "Tourism Scotland 2020" was launched in June 2012, and it was developed and led by the industry under the Scottish Tourism Alliance, supported by the public sector. It is built on an in-depth understanding of market opportunities co-ordinated to Scotland's abilities. It provides a mutual agenda for the industry and supporting

organisations, focusing on a national long term tourism growth motivation. The following organisations helped develop “Tourism Scotland 2020”:

- Visit Scotland
- Scottish Enterprise
- Highlands & Islands Enterprise
- Scottish Tourism Alliance

Each of these organisations plays a vital role for tourism in Scotland by maximising the economic benefits, marketing, develop industry leaders, industry collaboration, creating sustainable economic growth and enabling the tourism sector to grow by raising the profile and value of the Scottish tourism industry.

The tourism strategy recognises the need to develop skills in a range of areas within the sector that will support the industry’s ambitions for growth, these including;

- 1) Management and Leadership
- 2) Enabling high quality customer experiences
- 3) Making tourism an attractive sector in which to work
- 4) Ensuring the availability of appropriate training

In addition to this, the strategy also sets out three main growth markets predicted to account for the majority of tourism spend in 2020. These are;

- 1) Home Turf – Visitors from the UK
- 2) Near Neighbours – European tourists from e.g. Scandinavia, Germany, France, Spain, Ireland, Netherlands and Italy
- 3) Distant Cousins – Visitors from US, Canada and Australia.

In 2010 the total spend for the Home Turf market was £2,517 million, with an increase to £2,889 million 1 year after the “Tourism Scotland 2020” was published. This number continued to grow, and is forecasted to be approximately £3,586 million in 2020. The same goes for Near Neighbours which saw a spend of £660 million in 2010, with an increase of £38 million in 2013. This target market is forecasted to reach £875 million in 2020. Please find more detailed statistics enclosed in Appendix 1.6. (Scottish Tourism Alliance, 2017)

Alongside the “Tourism Scotland 2020”, there has been developed a tourism strategy to support the national strategy. “The Tourism Development Framework for Scotland: Role of the planning system in delivering the Visitor Economy” has been arranged to assist and promote growth in Scotland’s visitor economy to 2020. The key in the Scottish tourism

strategy is their plans to play to their strengths by developing their assets. Some of the assets recognised as having real growth potential includes;

- Activities and Adventure
- Business Tourism
- Cruise
- Golf
- Mountain Biking
- Sailing

(The Scottish Tourism Alliance, 2017)

According to The Scottish Tourism Alliance (2017), Mountain Biking Tourism was worth £257m in sales to the Scottish Economy in 2017, and is seen to rise to £408m by 2025. Unfortunately, there has been no recent updates on the other assets in regards to worth.

Prior to “Tourism Scotland 2020” was published, Scotland’s visitor numbers, according to Visit Scotland (2011), were 16 million, compared to 14.8 million in 2015. It can be argued that the development of this strategy has been of less success for the tourism growth in Scotland.

Scotland has developed an extensive piece of work through their “Tourism Scotland 2020”, and it is structured a well-developed plan to increase visitor numbers and revenue by 2020, however as mentioned previously, there has been a drop in visitor numbers prior to the release of this strategy until 2015. In their tourism strategy there is a large focus on Nature, Heritage and Activities, which is important after reviewing Poon (1993) comparison regarding the “old tourist” and the “new tourist”. By offering a more rounded-experience, the “new tourist” is arguably more likely to be interested in visiting Scotland in the future. The strategy have also highlighted the importance of quality and skills, where enhancing relevant skills, knowledge and customer-focused attitude will help deliver consistently high quality experiences. However, even though they have highlighted this in their strategy, there is too little focus on it. Quality and skills for the employees in the tourism industry is vital to provide a high quality tourism product, and without the proper skills and knowledge it can arguably put the future of Scotland as a tourism destination at stake. Tourism is growing constantly, new places are being brought up to the surface as hot destinations. The most important part of the strategy is their wish to rely on industry-wide collaboration with strong leadership and business, local and national level. *“Tourism Scotland 2020 is not about starting from the beginning, but about doing more collaborative working – which is something the Scottish Tourism Alliance will lead, encourage and support.”* (Scottish Tourism Alliance, 2012)

Visit Britain (2015) published a “*Memorandum of Understanding between Visit Britain and Visit Scotland*” where Visit Britain and Visit Scotland can work together to improve the advertising activity in overseas markets and support the growth of the visitor economy. Through this collaboration, Visit Britain offers a platform of core and added value services which Visit Scotland can use to further support tourism in Scotland. Please find enclosed in Appendix 1.7 the agreed areas of partnership between Visit Britain and Visit Scotland.

Tarlow (2016) stated that the spread of terrorist groups throughout the world are major threats to tourism. Locations without Tourism Policy programs may suffer, and arguably experience a decline in visitor numbers. London was recently the victim of yet another terrorist attack, and big cities are more and more likely to experience the same. In Scotland there are big cities such as Edinburgh and Glasgow, so it is vital to implement Security and Safety to Scotland’s tourism strategy.

The Scottish Tourism Alliance published in 2016 a final mid-term review of Scotland Tourism 2020, where the Mid-Term review contains obstacles that have become apparent while trying to implement this strategy across Scotland. Their main focus areas in this report has been focusing on enhancing the performance, strengthen industry leadership, strengthen digital capability, enhancing the quality visitor experience and influence investment. Through their Mid-Term review it was reported that the TS2020 Framework had to take into account significant changes in conditions since 2012. The Scottish Tourism Alliance (2016) stated that the strategy needs to define a narrower set of principal priorities for 2016-2020 due to political instability and other challenges that have occurred after 2012. Another issue has been the lack of focus on researching, understanding and undertaking preparation for high growth potential markets such as China. The Scottish Tourism Alliance (2016) also saw a weakness in the importance sustainability had within the TS2020 Framework, and reports that Sustainable Tourism should be placed as a principle which supports all aspects of the framework. Please find enclosed in Appendix 1.8 a Priority and Project Initiation Process Map provided by The Scottish Tourism Alliance (2016)

Even though Scotland has developed a structured and well-planned tourism strategy, there are some current challenges facing the tourism industry that may arguably impact their overall aims and objectives, as their report was published in 2012. Setting long term goals is well important, however, in a fast-changing, politically unstable world, setting long-term goals may affect the final result greater than what was initially thought. Some of the challenges the tourism industry is currently facing includes;

- i. Changing labour conditions
- ii. Escalating business costs

- iii. Rising energy costs
- iv. Increased renovation and construction costs
- v. Effects of and scared about natural disasters
- vi. Effects and scares related to safety – e.g. Terrorism
- vii. On-going concerns about safety and security
- viii. Increased customer expectations
- ix. Accelerated change and merging of technologies
- x. Increased consolidation of brands and companies

(Flynn, 2017)

Many tourism areas have grown rapidly, and there are too many locations where there is a lack of skilled labour. Tourism needs people who are both motivated and well trained. Yet, too few people in the tourism industry speaks several languages, especially in the UK. Tourism Scotland 2020 have looked at this particular problem as a key area to growth, and they have realised the importance of well-trained staff to give tourists the most memorable vacation.

UK have recently been affected by the well-known phenomena “Brexit”. It is important to notice that this is a major challenge for the UK tourism at this stage, and the future of tourism remains uncertain at this point. Now that Theresa May have officially triggered Article 50 and the leaving of the EU is in full progress, UK travel, tourism and hospitality businesses could have surprising costs to recruit non-EU staff, while food and drink prices could arguably rise. However, despite this, the Sterling Pound is at its weakest, and therefore travelling to the UK is cheaper and tourists can see getting more for their money if they chose to vacate in the UK. “Scotland Tourism 2020” are using their cultural assets to draw attention to what they consider important target markets, such as Scandinavia, Germany, USA, Canada and Australia. This could arguably be a smart move considering the current exchange rate.

As mentioned, the UK consists of England, Scotland, Northern Ireland and Wales. All of these have developed strategic plans for tourism growth. England is the main part of the UK, therefore attracting more than 43.7 million holiday trips, 29.2 million short breaks, 13.9 million overnight business trips and 102.7 million domestic overnight trips. (Visit Britain, 2017). England’s Strategic Framework for Tourism differs from Scotland’s “Scotland Tourism 2020”, and the reason may arguably be due to the size of the tourism industry. England’s tourism strategy is clearly outlined with set objectives, this including;

- i. To increase England’s share of global visitor markets
- ii. To offer visitors compelling destinations of distinction
- iii. To champion successful, thriving tourism industry

- iv. To facilitate greater engagement between the visitor and the experience

(Visit England, 2011)

However, the Strategic Framework for Tourism developed by Visit England provides the coordinated approach needed for the public and private sector tourism industry to work together on four key objectives. Visit England (2017) is also highlighting the factors that may or may not affect the tourism industry in England: *“The 2010 Deloitte study forecasts real growth of 3% per annum for England with strong growth anticipated particularly over the post 2012 period. The forecast is based on a number of factors, including the relatively low value of sterling.”*

As well as looking at Scotland’s tourism strategy compared to England’s, it is also important to look at it in a global context. After reviewing the Federal Tourism Strategy in Canada, there is a lot of similarities between their strategy and Scotland Tourism 2020. Both strategies have a keen focus on skill and labour, however, for Canada being where Canada is, one of their four priorities are facilitating ease of access and movement for travellers while ensuring the safety and integrity of Canada’s borders. Due to the recent trigger of Article 50, it is vital that Scotland Tourism 2020 look into how they can continue to facilitate the flow of people, goods and services once UK is officially out of the EU. Both strategies focus on developing and investing in the country’s assets and products and how to develop their product niches with a strong potential for growth.

Even though Scotland is a well-known tourism destination, there has been a decrease in visitor numbers from 2011 to 2015, and the reason for this may arguably be that new destinations are being discovered that has more to offer than Scotland, or that tourists decide to visit England instead. Scotland Tourism 2020 was published in 2012 and sets out important priorities they need to develop in order to continue their growth in tourism, however, there is a lack of focus on a few key challenges that affects the tourism industry globally. After reviewing the TS2020 Framework, some strategic recommendations have been made in order to make the strategy more sustainable and more defined.

These recommendations include;

- i. A further, detailed depth into skills and labour and highlight the importance of well trained staff in order to give tourists the exceptional vacation
- ii. More focus on the Asian target market
- iii. Larger focus in the tourism strategy on the future of UK tourism in regards to political instability

- iv. A more detailed tourism strategy that sets out action plans for a shorter period of time, e.g. 2017-2020.
- v. Focus on safety and security on a larger scale due to recent terrorism incidents across the world, especially after the terrorist attack in London in 2017.

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# Appendix

## Appendix 1.1

Top ten destinations in the world for international tourism (visits)

| 2011 Rank | Destination | Staying visits (m) | 2010 Rank |
|-----------|-------------|--------------------|-----------|
| 1         | France      | 79.5               | 1         |
| 2         | USA         | 62.3               | 2         |
| 3         | China       | 57.6               | 3         |
| 4         | Spain       | 56.7               | 4         |
| 5         | Italy       | 46.1               | 5         |
| 6         | Turkey      | 29.3               | 7         |
| 7         | UK          | 29.2               | 6         |
| 8         | Germany     | 28.4               | 8         |
| 9         | Malaysia    | 24.7               | 9         |
| 10        | Mexico      | 23.4               | 10        |

(Visit Britain, 2013)

## Appendix 1.2

|              | OLD TOURISTS                                                                                                                                                                                                                                                             | NEW TOURISTS                                                                                                                                                                                                                                                                                   |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Tourists | <ul style="list-style-type: none"> <li>- Homogenous</li> <li>- Security in numbers</li> <li>- Everything prepaid, pre-arranged</li> </ul>                                                                                                                                | <ul style="list-style-type: none"> <li>- Spontaneous, unpredictable, hybrid</li> <li>- Want to be different from the crowd</li> <li>- Want to be in control</li> </ul>                                                                                                                         |
| Motivations  | <ul style="list-style-type: none"> <li>- Travel is a novelty</li> <li>- Destination did not matter</li> <li>- Quality of services not important</li> <li>- Search for the sun</li> <li>- Escape from home and work</li> <li>- Just to show that you have been</li> </ul> | <ul style="list-style-type: none"> <li>- Travel is a chore</li> <li>- Destination is travel's raison d'être</li> <li>- Quality, value for money a premium</li> <li>- Experience something different</li> <li>- Vacation as an extension of life</li> <li>- "Just for the fun of it"</li> </ul> |
| Attitudes    | <ul style="list-style-type: none"> <li>- Here today, gone tomorrow</li> <li>- West is best</li> <li>- Superiority</li> <li>- Impose western values on hosts</li> </ul>                                                                                                   | <ul style="list-style-type: none"> <li>- See and enjoy but do not destroy</li> <li>- Appreciation for the different</li> <li>- Understanding, better informed</li> <li>- Know how to behave</li> </ul>                                                                                         |
| Interests    | <ul style="list-style-type: none"> <li>- Lie in the sun</li> <li>- Get sunburnt</li> <li>- Like attractions</li> <li>- No special interests</li> <li>- Eat in hotel dining room</li> </ul>                                                                               | <ul style="list-style-type: none"> <li>- Get up and get active</li> <li>- Keep clothes on</li> <li>- Like sports</li> <li>- Special interests</li> <li>- Try out the local fare</li> </ul>                                                                                                     |

(Poon, 1993)

## Appendix 1.3.

### *Facts and figures*



## Appendix 1.4

### Vision

The Outstanding Universal Value of the City of Bath World Heritage Site will be conserved and enhanced for this and future generations.

Bath will be an exemplar of sustainable urban management, striving to balance the needs of an inventive and entrepreneurial 21st century place with the conservation and enhancement of the unique heritage which is of world-wide significance.

It will be a centre of excellence for urban heritage management and conservation, founded on strong and effective partnerships of local, national and international communities and organisations.

The impact upon the Outstanding Universal Value will be a key consideration in all proposals for change, recognising that small-scale incremental change can be as influential as major interventions. There will be a strong presumption against development that would harm the Outstanding Universal Value of the World Heritage Site itself, or its setting.

Bath will be accessible and enjoyable to all; a Site that understands and celebrates its Outstanding Universal Value, beauty and character.

World Heritage status will continue to be used to support and further the vitality and wellbeing of the local community.

# Executive Summary

The City of Bath World Heritage Site was inscribed in 1987. The reasons for inscription, or key attributes of Outstanding Universal Value, can be summarised as:

1. Roman archaeology
2. The hot springs
3. Georgian town planning
4. Georgian architecture
5. The green setting of the City in a hollow in the hills
6. Georgian architecture reflecting 18th century social ambitions

Bath World Heritage Site is exceptional in that the inscription covers the entire city, not just the central suburb or individual monuments. This is a situation paralleled in very few other sites world-wide and means that all of the needs of a thriving modern city must be balanced with conservation of the outstanding heritage.

The current state of conservation in Bath is very good. The city can be described as prosperous, with few examples of derelict or abandoned buildings. It has a long tradition of caring for its heritage and has management systems, both locally and nationally, in place to ensure this continues. It also has a strong and experienced network of stakeholders committed to delivering the aims of the plan.

The first Bath World Heritage Site Management Plan (2003 – 2009) concentrated on establishing systems of management and ensuring appropriate policies and guidelines were in place. The second plan (2010-2016) applied these systems in the face of significant development pressure and sought to apply the lessons learnt from the UNESCO/COMOS Mission of 2008. Much was achieved during both plan periods.

The principal challenge in this plan is to deliver a further phase of considerable growth and change whilst sustaining the Outstanding Universal Value for which the site was inscribed. This is reflected in the plan priorities.

The economy of the city is changing, with former traditional employers moving out, and new industry moving in. A significant swathe of the valley floor which formally housed heavy industry is undergoing re-development, and this 'Bath City Riverside' enterprise area will represent the most significant physical change that the city has seen for a generation. Delivering this sensitively is a priority.

Moving people about within the historic settlement is an on-going challenge. An ambitious transport strategy has recently been adopted to address this and delivery will be within this plan period.

The public realm of the city, both historic and modern, is often in a poorer condition than the buildings. Addressing and financing a response to this, in the face of diminishing public funds, remains a priority issue.

Interpretation and education surrounding the site is another priority carried forward. Much work has been done to address this, including the prospect of a World Heritage Interpretation Centre, which now needs to be delivered.

Finally, environmental issues such as protection of the green setting of Bath, flooding and mineral extraction potentially impacting on the hot springs needs to be carefully monitored and handled.

The priorities of this plan are therefore:

- Managing Development
- Transport
- Public Realm
- Interpretation and Education
- Environmental Resilience

This is an optimistic and ambitious plan. The World Heritage property is already in good condition. This plan seeks to 'raise the bar' and ensure that the City of Bath World Heritage Site is an exemplar of urban heritage management.

## Appendix 1.5

| Country of Residence          | Trips 2015 (m) | % of total  | Nights 2015 (m) | % of total  | Spend 2015 (£m) | % of total  |
|-------------------------------|----------------|-------------|-----------------|-------------|-----------------|-------------|
| Scotland                      | 5.84           | 39%         | 16.67           | 26%         | 1,154           | 23%         |
| England                       | 5.99           | 40%         | 23.99           | 38%         | 2,086           | 41%         |
| Wales                         | 0.16           | 1%          | 0.67            | 1%          | 39              | 1%          |
| <b>Total GB Tourism</b>       | <b>12.00</b>   | <b>81%</b>  | <b>41.34</b>    | <b>65%</b>  | <b>3,279</b>    | <b>65%</b>  |
| Northern Ireland              | 0.27           | 2%          | 0.94            | 1%          | 97              | 2%          |
| <b>Total overseas tourism</b> | <b>2.59</b>    | <b>17%</b>  | <b>21.49</b>    | <b>34%</b>  | <b>1,695</b>    | <b>33%</b>  |
| <b>Total</b>                  | <b>14.86</b>   | <b>100%</b> | <b>63.77</b>    | <b>100%</b> | <b>5,071</b>    | <b>100%</b> |

## Appendix 1.6

| Spend<br>(£ million/ nominal) | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016(e) | 2020(f) |
|-------------------------------|--------|--------|--------|--------|--------|--------|---------|---------|
| Home Turf                     | £2,517 | £3,018 | £2,892 | £2,889 | £2,871 | £3,279 | £3,288  | £3,586  |
| Near Neighbours               | £660   | £732   | £641   | £698   | £706   | £687   | £663    | £875    |
| Distant Cousins               | £348   | £414   | £450   | £457   | £654   | £595   | £756    | £505    |
| Emerging Markets              | £45    | £34    | £55    | £79    | £93    | £60    | £53     | £70     |

Source: Great Britain Tourism Survey / International Passenger Survey. (£million / nominal (includes inflation))

## Appendix 1.7

### 5. Agreed areas of partnership

VB and VS will, on the basis of the agreed principles set out in this document, provide the following Services in accordance with the service levels set out in the SLA and access to the following Added Value Opportunities, with more detail set out on an annual basis in the HLMP and SLA:

| Services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Added Value Opportunities (charged back if taken up)                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Market Intelligence/Research</b><br>Sharing appropriate research, which, subject to the agreement of both partners, and commercial/ competitive sensitivities will not be unreasonably withheld.<br>Identifying areas for collaborative approach to research activity for mutual benefit.<br>VB will include VS in the distribution of scheduled IPS mailing and VS will include VB in their similar mailings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Bespoke intelligence reports/advice on specific partner issues and plans requiring more than 2 hours work by partner staff per project/request, subject to resource availability<br>Jointly funded research projects into topics agreed between VB and VS                                                                                                                                                                                                                                                            |
| <b>Overseas Network</b><br>VisitBritain's international platform will continue to provide trusted insights, connectivity with media and trade in market and to support marketing programmes including for Scotland.<br>VB teams will develop a clear understanding of Scotland and its tourism products including agreeing, on an annual basis, key themes/products on which VS wishes for support, for example 2016 Year of Innovation, Architecture and Design and 2017 Year of History, Heritage and Archaeology.<br>VS will support VB's overseas network colleagues to develop knowledge of Scotland and its tourism product.<br>VB teams will present Scotland equitably within the GREAT campaign.                                                                                                                                                                                                                                              | A co-location agreement will set out full details of any contract for VS staff to be based on the VB platform<br>VS may host product knowledge education and staff meetings in Scotland for VB teams.                                                                                                                                                                                                                                                                                                                |
| <b>Marketing via GREAT Britain campaign</b><br>The Government has announced that the GREAT campaign has had its funding increased to £60 million a year for at least the next four years. VB will continue to deliver the GREAT campaign for tourism, with £22.8 million approved for 2016/17.<br>The exposure of Scotland within GREAT and core campaign activity will be agreed by VB and VS Marketing Directors and will be informed by the VS brand wheel and Spirit Strategy. It is expected that this will include: <ul style="list-style-type: none"> <li>Links from visitbritain.com portals to VS website(s)</li> <li>VS product information (core content) to be carried on visitbritain.com websites. Content to be supplied by VS</li> <li>VS online videos to be carried on visitbritain.com. Content to be supplied by VS.</li> <li>Inclusion in visitbritain.com online distribution deals where appropriate to all parties.</li> </ul> | Additional paid for coverage and advertorial opportunities on visitbritain.com<br>VB will provide VS with opportunities to participate in Britain international activity on a case by case basis. This can include campaigns, exhibitions and road shows. Full details of these options, and any costs, are made available through the appropriate marketing and trade departments of VB.<br>Joint photographic shoots<br>Sponsorship opportunities at exhibitions, missions and events either in the UK or overseas |

| Services                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Added Value Opportunities (charged back if taken up)                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Access to the online shop platform to retail appropriate destination product. VB has online shops in 7 languages and 12 currencies covering 94 markets. Product suitability and commission structures to be agreed with VB.</li> <li>• Opportunity for inclusion of partner imagery on the VB Image Library allowing for approved and on brand imagery to reach a wider audience.</li> </ul>                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                 |
| <p><b>Press and PR</b></p> <p>The exposure of partner messages and content will increase as a result of GREAT and coverage will include</p> <ul style="list-style-type: none"> <li>• Inclusion of appropriate key VS product – content to be provided by VS - in VB PR team's ongoing media relations activity to include regular communications with stakeholders and inclusion, where appropriate, in other press releases, trade newsletters and updates</li> <li>• Inclusion in the online press centre copyright free features where relevant; content to be provided by VS</li> <li>• Collaboration and cost sharing on any appropriate targeted press visits activity as agreed in bilateral planning sessions.</li> </ul> | <p>Participation in partner media events such as meet the press/ events in overseas markets.</p>                                                                                                                                                                                                |
| <p><b>Trade response</b></p> <p>Basic enquiries on Scotland to be handled by VB overseas offices; VS will respond to enquiries passed on, where appropriate, by VB's team</p> <p>VB will pass on appropriate leads received from Tour Operators to VS</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p>VS can buy into VB's trade communications programmes using contact data in VB databases. Depending upon Data Protection requirements, VS may be able to send specific campaign messages to customers on VB's databases, providing they do this via VB. There will be an associated cost.</p> |
| <p><b>Travel trade</b></p> <p>VB and VS to collaborate on the internationalisation of Scottish businesses, the development of new and extended product via intermediaries, the promotion of Scotland product via travel intermediaries, and the education and incentivising of sales via the trade.</p>                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                 |
| <p><b>Digital and content</b></p> <p>VB will collaborate with VS on a regular basis to create best-in-class website content aligned with the objectives of VB/ VS, linking through to VS where appropriate.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                 |
| <p><b>Business Visits &amp; Events</b></p> <p>VB will add value to Scotland's bids for discretionary BV&amp;E business through a process to be agreed by VS of a Britain-wide bidding framework, working closely with UKTI and the wider Britain campaign. VB's work in this space should be collaborative and add value to work already delivered by VS, bringing a new dimension to and not duplicating existing work.</p>                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                 |

| Services                                                                                                                                                                                                                                                                                                                                                                                                                                 | Added Value Opportunities (charged back if taken up) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| <p><b>Competitiveness</b></p> <p>VB and VS will, where appropriate, share research, evidence and policy positions. Partners will work together on matters which may include visa and aviation policy.</p> <p>VB and VS policy teams will ensure open communications between teams and align policy message wherever possible.</p> <p>VS is a member of VB's BTIG; VS will engage appropriately with VB in arising matters of policy.</p> |                                                      |
| <p><b>Corporate expertise</b></p> <p>Access to advice or support from specific areas of expertise as requested (e.g. Tourism Affairs, Business Planning, Research and Insights etc) by staff in each organisation</p> <p>Both partners acknowledge the business benefits of secondments and shadowing and agree to consider all reasonable requests</p>                                                                                  |                                                      |

## Appendix 1.8

### Priority and Project Initiation Process Map (to be updated as part of the on-going Review Process)

