# Executive Summary
Development Framework to 2020 for the Visitor Economy (Refresh 2016)

The Tourism Development Framework for Scotland refresh 2016: *role of the planning system in delivering the Visitor Economy* (the Framework refresh) sets out actions to assist and promote growth in Scotland's visitor economy to 2020. It supports the national tourism strategy (*Tourism Scotland 2020*) produced by the Tourism Leadership Group where our collective ambition is for Scotland to be recognised as a destination of first choice. It also supports the vision in the National Planning Framework on securing sustainable economic growth and the transition to a low carbon economy.

The primary purpose of this Framework is to provide guidance to development planning authorities to help secure growth in the visitor economy.

The *Tourism Scotland 2020* strategy is set out in the following Diagram:
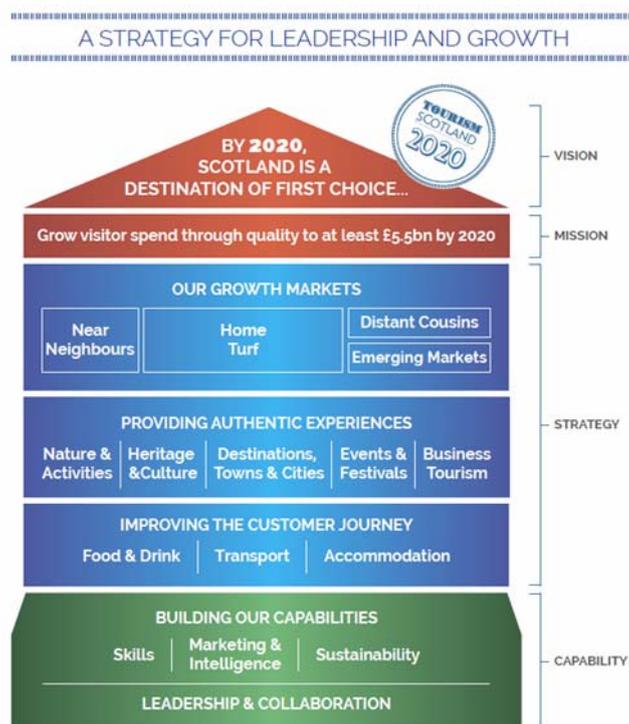
This Framework refresh sets out actions and provides guidance to help co-ordinate future development and growth in the visitor economy. Through a greater focus on co-ordination, the actions proposed by the Framework refresh will help secure added value from future investment in infrastructure and promote engagement with the development plan system to realise future opportunities.

The Framework refresh is not the start of a new process. It builds on and continues to develop the ongoing partnership which Scottish Government and its agencies have had for some time with development planning authorities and the many other stakeholders working in the visitor economy at national and local level. This Framework refresh should also be considered by local authorities as they work with community planning partners to take forward their Single Outcome Agreements.

The visitor economy in Scotland supports many jobs across Scotland. For some, the visitor economy is a cornerstone of its local economy. Realising its growth potential to 2020 through the planning system is an important opportunity to grasp especially in our challenging economic climate. This Framework refresh sets out actions to support sustainable growth in the visitor economy to 2020.

It aligns with the appropriate infrastructure and other relevant investment strategies across a range of public sector organisations and sets out the future aspirations and ambitions of stakeholders working in the tourism sector for each development planning authority. These aspirations and ambitions are published in a separate annex (*Action Plans)* and provide a range of opportunities to be considered in emerging and future development plans across Scotland.

The remit of this document is to focus on development matters. Therefore it does not address other important operational matters in the sector such as service, skills, training or quality highlighted and being taken forward in parallel in *Tourism Scotland 2020*.

In terms of its relationship with *Tourism Scotland 2020*, the document focuses on the investment and development opportunities arising from two key parts of the strategy - *Improving the Customer Journey* and *Providing Authentic Experiences*.

It highlights opportunities based on evidence of market demand, to help stimulate growth in the visitor economy with support from the development planning and development management system.

Nothing in this Framework should be read as a commitment that public resources will be provided for any specific project.

To create a more dynamic document VisitScotland will pilot a mapping and gapping exercise in two locations using consumer demand data to overlay supply and identify potential development opportunities.

Reference	Description of Priority Action

	Visitor Economy
1.9 – 1.13	VisitScotland will develop a new mapping and gapping methodology to help provide economic and development planning authorities with future demand and product gap data to support opportunities for growth in the visitor economy. (Initially two pilot projects will test the robustness of this methodology).
	Improving the Customer Journey
Theme 1	**Digital**
2.3 – 2.8	Working with the Scottish Government and key public and private stakeholders involved in the delivery of the Digital Scotland strategy, VisitScotland will seek to ensure that the needs of the tourism economy are effectively catered for in all action plans.
Theme 2	**Transport**
Theme 2A	**Travelling to Scotland**
2.14 – 2.17	**Airports** Working in partnership with airport operators, Transport Scotland, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage a review of the accessibility of their transport interchanges to all modes of travel with the aim of improving sustainability of travel for onward journeys.
2.18 – 2.20	**Railways** Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will encourage improvements to mainline stations to enhance the visitor experience and enable greater accessibility to all modes of travel.
2.21 – 2.23	**Ports** Working in partnership with Transport Scotland, port operators, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage improvements to ports to enhance the visitor experience and enable greater accessibility to all modes of travel.
2.24 – 2.26	**Cruise Market** Working in partnership with Cruise Scotland, VisitScotland, will examine the future of the cruise market for Scotland and identify infrastructure investment priorities for action to grow this market.
Theme 2B	**Travelling around Scotland**
2.27	**Air Services** Working in partnership with airport operators, national and local stakeholders, VisitScotland will focus on investment/infrastructure needs. Consider measures to improve the visitor experience for airline passengers using internal domestic flights.
2.28 – 2.29	**Ferry Services** Working in partnership with Ferry operators, Transport Scotland and other national and local stakeholders, VisitScotland will consider measures to improve the quality of the visitor experience for ferry passengers.
2.30 – 2.32	**Railway Services** Working with Transport Scotland, Regional Transport Partnerships (RTPs), Network Rail, ScotRail and other stakeholders, VisitScotland will consider measures to improve the quality of the visitor experience for rail passengers.
2.33 – 2.37	**Road Improvements** Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the prioritisation of interventions to improve connectivity along strategic visitor routes. Working in partnership with Transport Scotland, Regional Transport Partnerships (RTPs) and partner councils, and other stakeholders, VisitScotland will encourage the development of a series of scenic tourist routes throughout Scotland.

Reference in Framework (Para. No.)	Description of Priority Action
2.38 – 2.39	**Coach and bus services** Working in partnership with development planning authorities, Councils, Regional Transport Partnerships and other stakeholders, VisitScotland will encourage improvements for the operation of coach and bus services in recognised tourist destinations.
Theme 3	**Accommodation**
2.40 – 2.53	**Accommodation Requirements** In partnership with local and national stakeholders, VisitScotland encourages development planning authorities to consider further accommodation requirements at locations where there is evidence of market demand including the upgrade or expansion of existing hotels. Specific priorities include: a. Identifying locations for investment in new hotels in city centre locations around major conferences which will also support business tourism; b. Identifying locations for investment in new hotel accommodation in towns and rural areas, including the country house hotel product; and c. Setting policy to encourage investment in other forms of holiday accommodation in rural areas such as new self-catering accommodation (where deficiencies are identified), bunkhouse provision, holiday parks and novel low carbon development.
2.54 -2.58	**Resort Development** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to identify areas for urban and rural resorts in their development plans based on market demand.
Theme 4	**Food & Drink**
2.59 – 2.63	The local representation of food and drink should be an integral part of future tourism development strategies and in the context of the Framework, any supporting infrastructure.
	Providing Authentic Experiences
Theme 5	**Nature & Activities**
2.68 – 2.71	**Scotland's Paths & Trails** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the development opportunities along our designated path network to enhance their tourism potential.
2.72 – 2.74	**Forrest Tourism** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to examine the tourism potential from our forests and woodlands and consider the allocation of development opportunities in suitable areas in local development plans.
2.75 – 2.79	**Scotland's Marine Environment** Working in partnership with Marine Scotland, regional marine planning partnerships, and the various stakeholders responsible for delivering the "Awakening the Giant" framework, VisitScotland will encourage development planning authorities to examine the tourism potential around our coasts and seas and consider the promotion of marine based development strategies in local development and regional marine plans.
2.80 – 2.82	**Scotland's Canals** Working in partnership with Scottish Canals and other local and national stakeholders, VisitScotland encourages development planning authorities to continue to promote the tourism potential of our canals and waterways and consider the allocation of suitable sites in local development plans.
2.83 – 2.84	**Scotland's Outdoor Activities - Snow Sports** Development planning authorities together with other local and national stakeholders are encouraged by

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	VisitScotland to consider and where appropriate include in their development plans the upgrade of supporting infrastructure at snow resorts where it meets the wider tourism market.
2.85 – 2.88	**Scotland's Outdoor Activities - Golf** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the upgrade of infrastructure at existing golf courses where it meets the wider tourism market supported by appropriate enabling development as required.
2.89 – 2.95	**Scotland's Outdoor Activities – Cycle Tourism** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of cycling infrastructure facilities to meet the wider tourism market.
2.96 – 2.97	**Scotland's Outdoor Activities - Country Sports Tourism** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of country sports facilities to meet the wider tourism market.
2.98 – 2.101	**Scotland's Outdoor Activities - Wildlife Tourism** Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the potential for and upgrade of facilities for wildlife tourism to meet the wider tourism market.
2.104 – 2.107	**Scotland's National Parks** VisitScotland along with other local and national stakeholders will work in partnership with both National Park Authorities to promote growth in their visitor economies in their development plans.
Theme 6	**Heritage & Culture**
2.108 – 2.113	Development planning authorities together with other local and national stakeholders are encouraged by VisitScotland to consider the regeneration potential from expansion of tourism/visitor infrastructure in support of successful heritage and culture assets in their development plans based on evidence of market demand.
Theme 7	**Destinations, Towns & Cities**
2.114 – 2.116	**Maintaining and Enhancing Our Public Realm** VisitScotland, working in partnership with local and national stakeholders will encourage the improvement of our public realm at our transport gateways and in our main tourist destinations through innovative use of BID and City Deal funding.
2.117 - 2120	**Towns & Cities** VisitScotland, working in partnership with local and national stakeholders will encourage the improvement of our public realm at our transport gateways and in our main tourist destinations through innovative use of BID and City Deal funding.
Theme 8	**Business Tourism**
2.121 – 2.126	Development planning authorities, in conjunction with other local and national stakeholders, are encouraged by VisitScotland to consider the potential for expansion in existing conference, exhibition and event locations through their development plans based on evidence of market demand, including a strategic review of hotel provision required to support the business events sector.
Theme 9	**Events & Festivals**
2.127 – 2.130	VisitScotland encourages development planning authorities, together with other local and national stakeholders, to consider infrastructure requirements for an events and festival programme underpinning local tourism development strategies.
	Making it Happen

Reference in Framework (Para. No.)	Description of Priority Action
	Introduction Outcomes from the Planning System
3.1 – 3.3	VisitScotland, using its extensive supply and demand research data, will work with local authorities to assist in developing local visitor economy strategies and development plans. (An initial pilot project involving 2 contrasting locations in Scotland is planned to test this methodology).

Underlying this Framework is the support for the spatial strategy in The National Planning Framework to help make Scotland a low carbon place; a natural place to invest as well as being a successful, sustainable place which is well connected. It supports Scottish Government's aims for quality in design and place making in our environment.

The Framework informs statutory development plans about potential development opportunities and the need for a supportive policy framework in approved development plans. It is to be used as a material consideration in the determination of planning applications for new and expanded facilities which form part of the visitor economy.

Development plans which are attuned to the needs of the visitor economy are of particular significance in enabling Scotland to attract and secure further investment, whether it comes from an indigenous business or from an inward investor.