

SUBMISSION FROM SCOTTISH TOURISM ALLIANCE

Tourism Scotland 2020

Tourism Scotland 2020 (TS2020) is the national tourism strategy. It was launched in 2012 with the collective ambition *“to make Scotland a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people”*. In addition to the vision, TS2020 also set a target to increase the total spend by visitors by £1bn in real terms from £4.5bn to at least £5.5bn by 2020.

For the first time, the national tourism strategy is being led by the industry, with support from Scottish Government and public agencies. The tourism industry leadership group, The Scottish Tourism Alliance has taken on guardianship of the strategy and is responsible for coordinating activities and overseeing progress.

Mid Term Review

Three years into the strategy and a mid-term review has just begun. The review is being overseen by a small working group of industry and agency representatives (chaired by the Scottish Tourism Alliance) and the findings and recommendations from this work will be put to the TS2020 Strategy Group which comprises industry, agency and Government representatives.

Work began on the review at the beginning of October 2015 and discussion of initial findings will be presented to the Strategy Group at the beginning of December, after which further work will be undertaken to refine and adapt the strategy as appropriate. The conclusions from the Mid Term Review will be announced during Scottish Tourism Week on 11 – 18 March 2016.

Consultants were appointed in October to provide an independent analysis of the strategy's progress. The STA has received early findings which are shown below and which are based on analysis of reported TS2020 activities, wider scanning of current economic, environmental and social climate and approximately 25 interviews with key stakeholders. Their initial findings suggest:

- *TS2020 has demonstrated leadership, developed commitment, stimulated collaboration and mobilised effort and resource.*
- *Projects to date have generated a wide range of benefits which have set firm foundations for the period 2016-2020.*
- *Nevertheless, the sector is currently not on track to deliver the headline mission of growing visitor spend to £5.5-£6.5bn by 2020.*
- *Identifying what might be holding the industry back and how progress may be accelerated will be important to the next phase of the Review.*
- *The consistent message from the interviews is that the next stage of the strategy needs to be focussed, perhaps around a small group of Game Changing priorities that will help the industry close the gap in performance on visitor spend.*

- *There are further tensions and dilemmas to consider that relate to leadership, the differing needs of destinations, and the degree of customisation required to make the strategy relevant to large and small businesses.*

With the alignment of tourism strategies across Scotland and significant improvements in collaboration between stakeholders since the launch of the strategy, there is greater clarity over the emerging priorities that will require the focus of private and public sector commitment and investment:

<i>Emerging Priorities (draft)</i>	
<i>1. Digital</i>	<i>2. Internationalisation</i>
<i>3. Built Infrastructure</i>	<i>4. Visitor Experience</i>
<i>5. Transport Connectivity</i>	<i>6. Leadership for Growth</i>

**Scottish Tourism Alliance
November 2015**