

Scotland's National Tourism Development Framework Icelandic Tourism Conference, Akureyri



Wednesday 28 October 2015
Riddell Graham, Director of Partnerships,
VisitScotland

Scotland and Iceland – some quick comparisons



Scotland



Iceland

Area (km ²)	<ul style="list-style-type: none">• 78,000	<ul style="list-style-type: none">• 103,000
Population (million)	<ul style="list-style-type: none">• 5.347	<ul style="list-style-type: none">• 0.330
GDP (ISK billion)	<ul style="list-style-type: none">• 26,800	<ul style="list-style-type: none">• 1,993
Tourism Spend (ISK billion)	<ul style="list-style-type: none">• 1,864.3	<ul style="list-style-type: none">• 252.9
Visitors (million)	<ul style="list-style-type: none">• 15.5 overnight• 127 day	<ul style="list-style-type: none">• 5.5 overnight
Businesses	<ul style="list-style-type: none">• 20,000	<ul style="list-style-type: none">• 3,500
Jobs	<ul style="list-style-type: none">• 196,000	<ul style="list-style-type: none">• 21,600

Scottish Tourism – key facts

Visitors

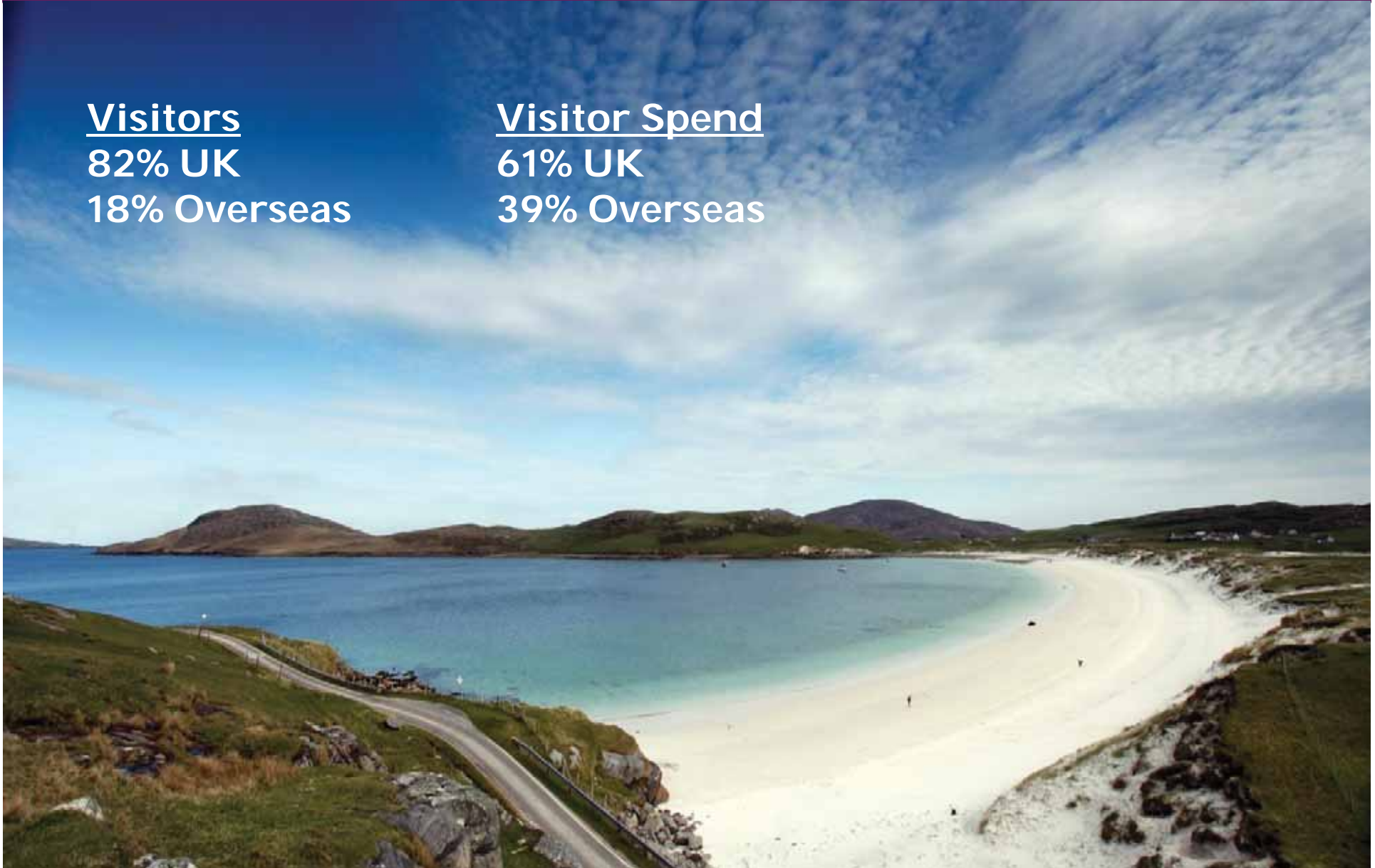
82% UK

18% Overseas

Visitor Spend

61% UK

39% Overseas



Core markets



Strategic Approach

Drivers
Enablers
Building Blocks



SPP and NPF2 (2010 – 2014)

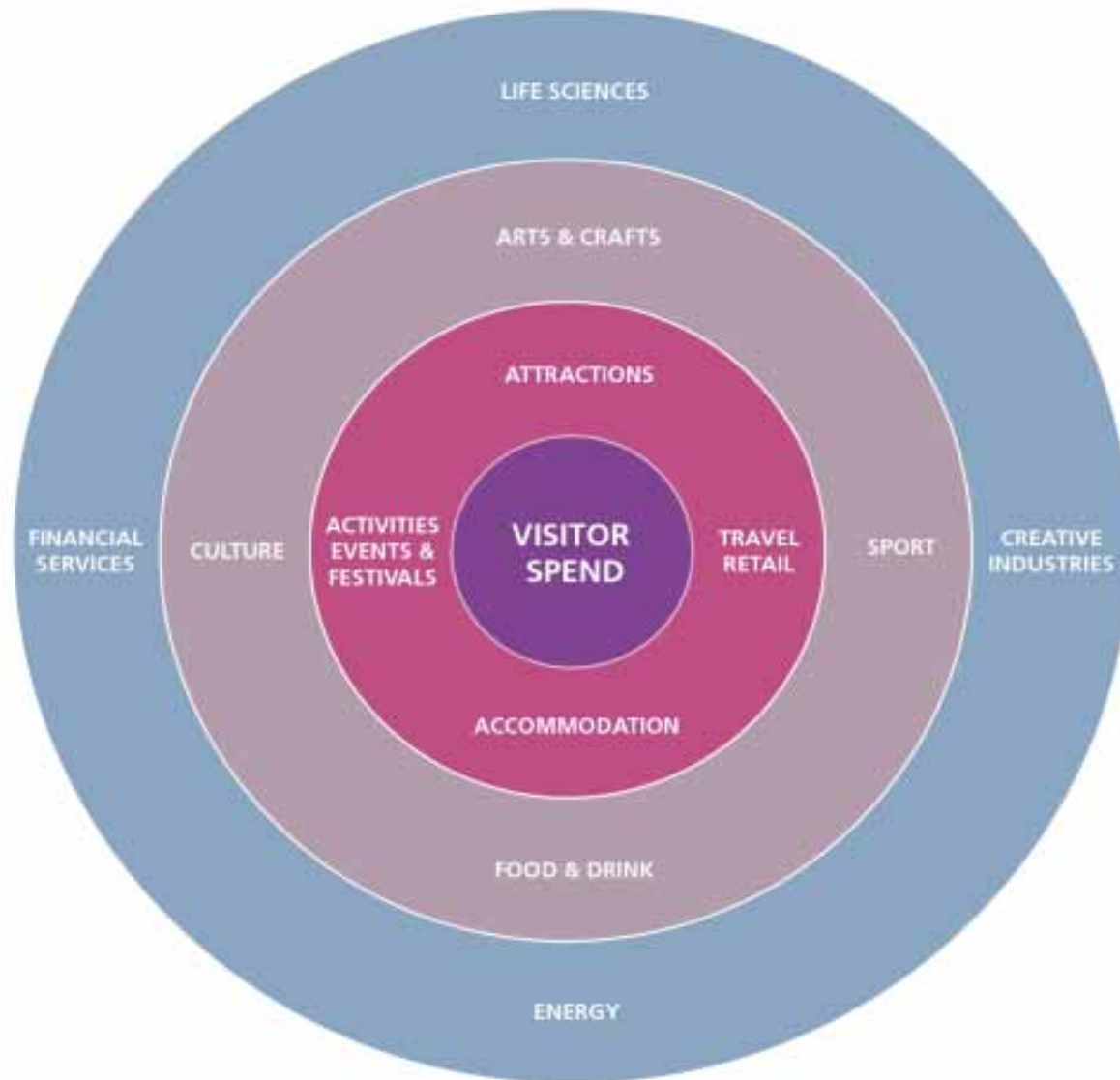
SCOTTISH
PLANNING
POLICY

NATIONAL PLANNING
FRAMEWORK

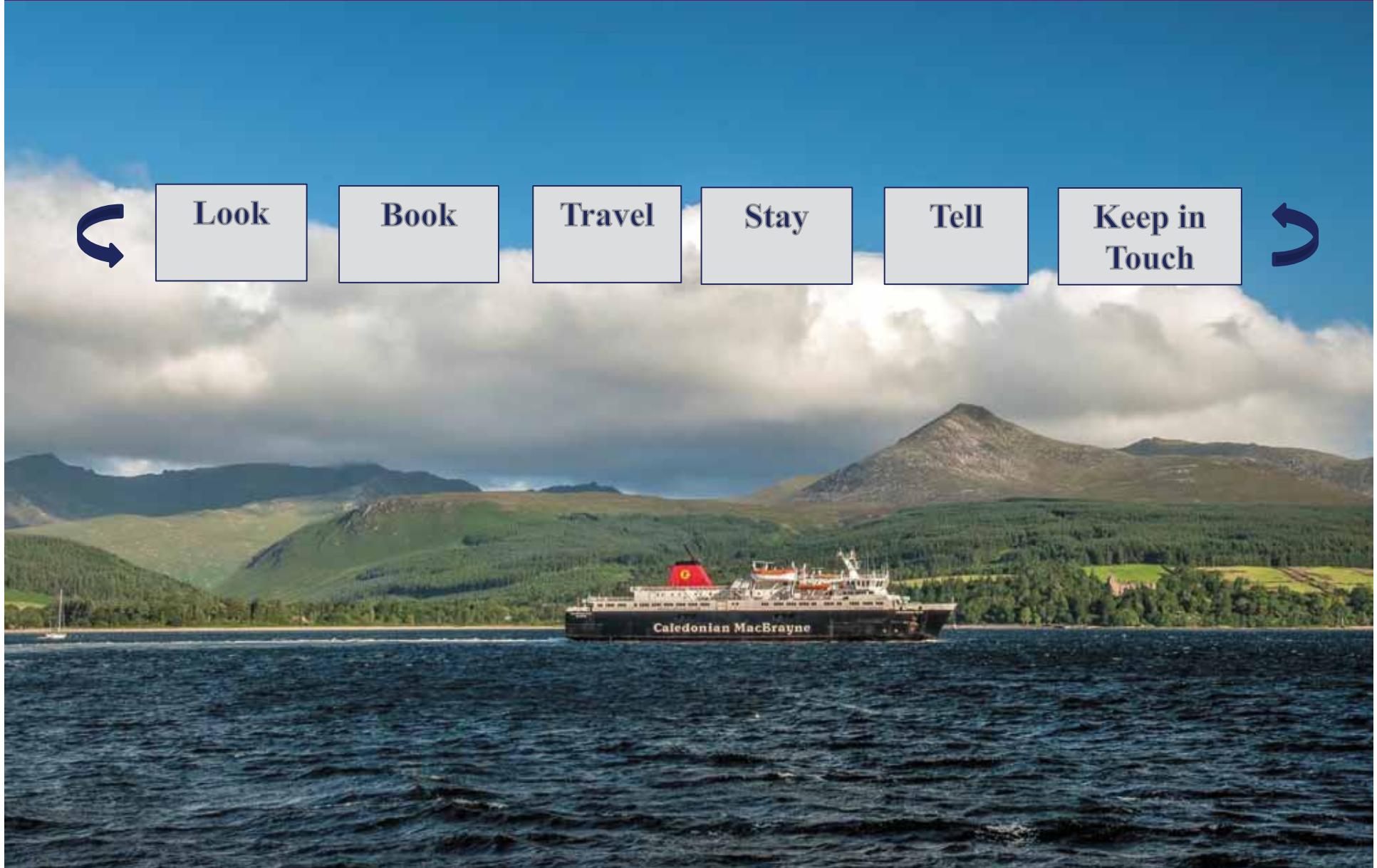
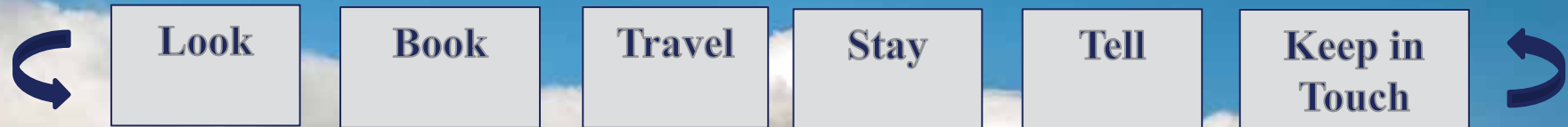
FOR SCOTLAND **2**



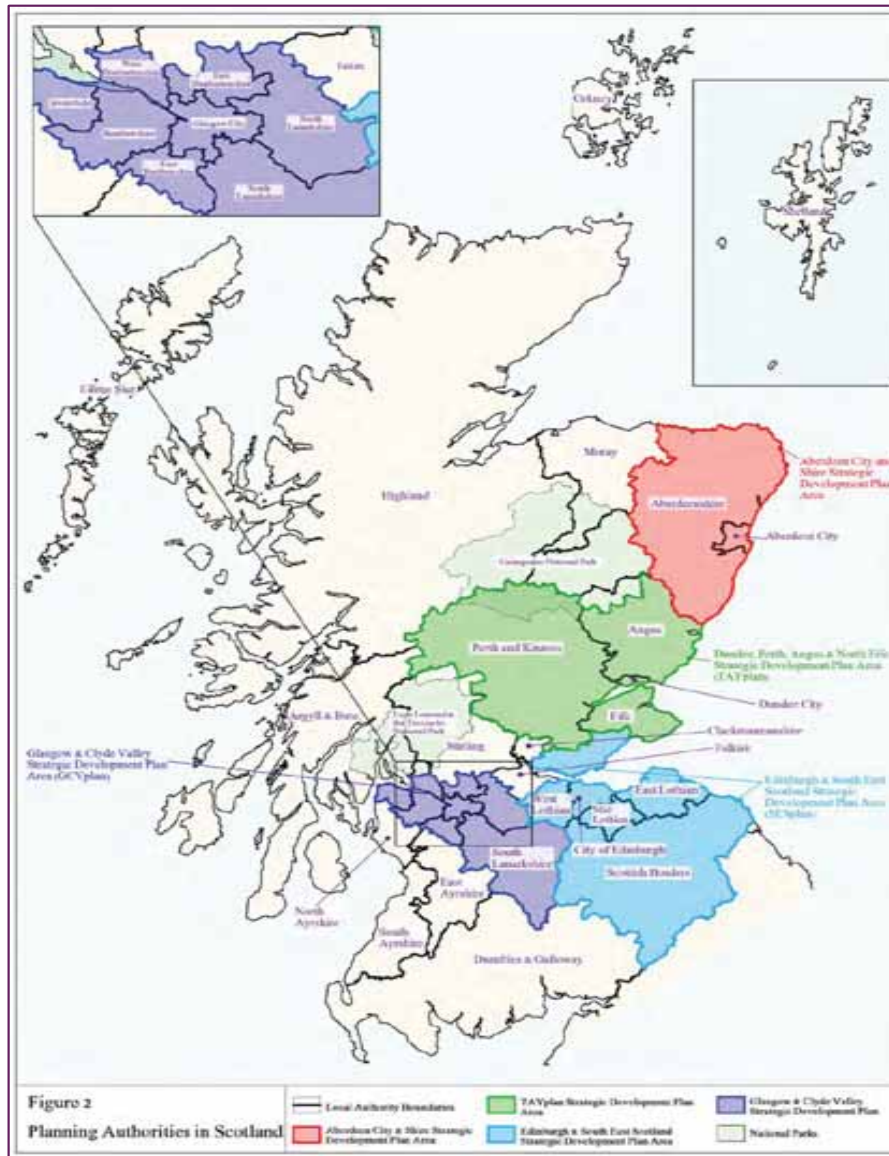
Visitor Economy



Customer Journey



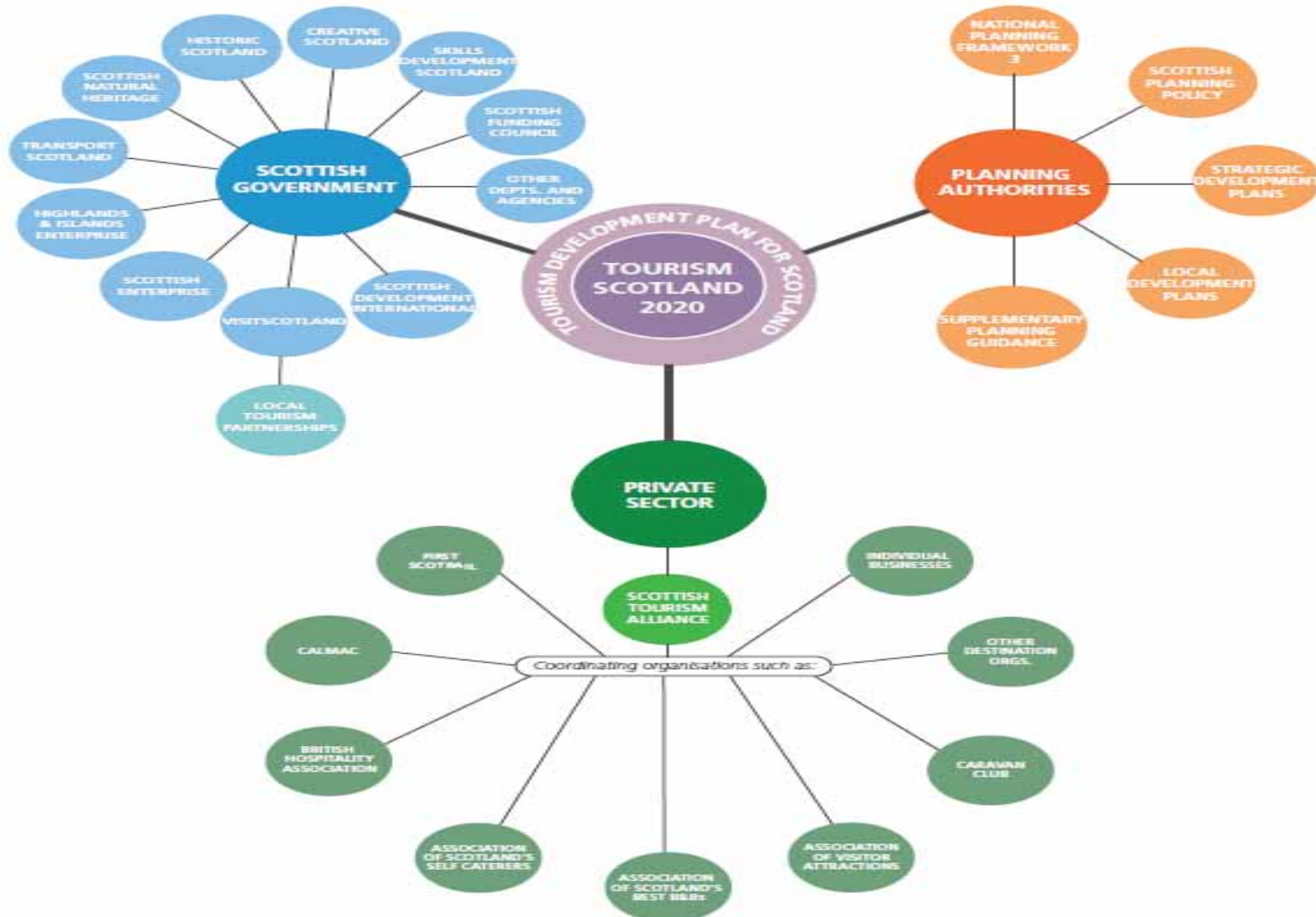
Scotland's Planning Authorities



TS2020 – Scotland’s National Tourism Strategy



Stakeholder Relationships and Development Planning

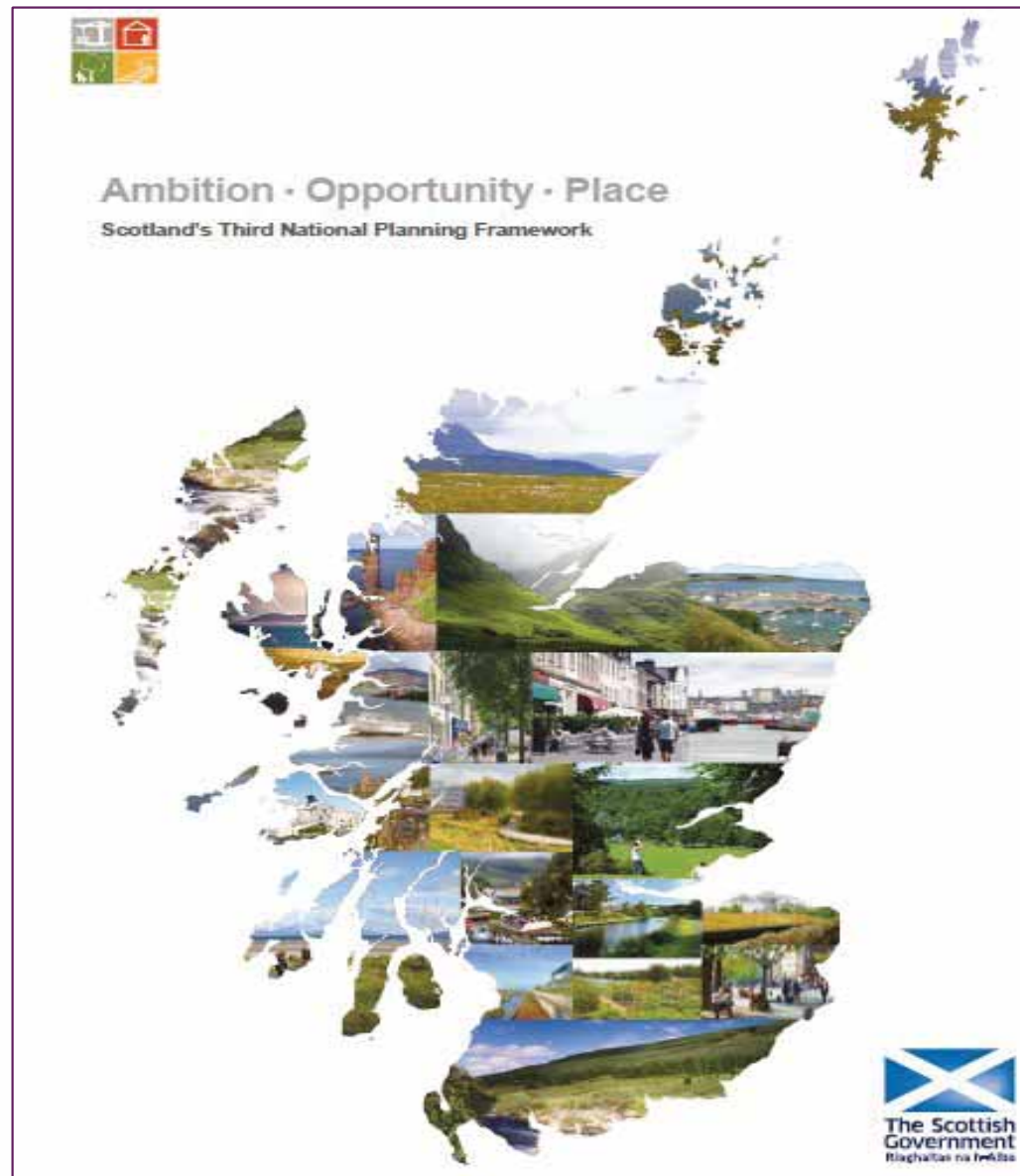


National Tourism Development Framework - Purpose

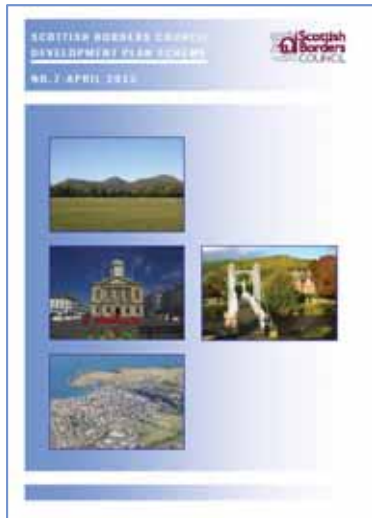


To provide guidance to development planning authorities to help secure growth in the visitor economy

National Planning Framework 3 and Scottish Planning Policy (2014)



Local Authority Development Plans



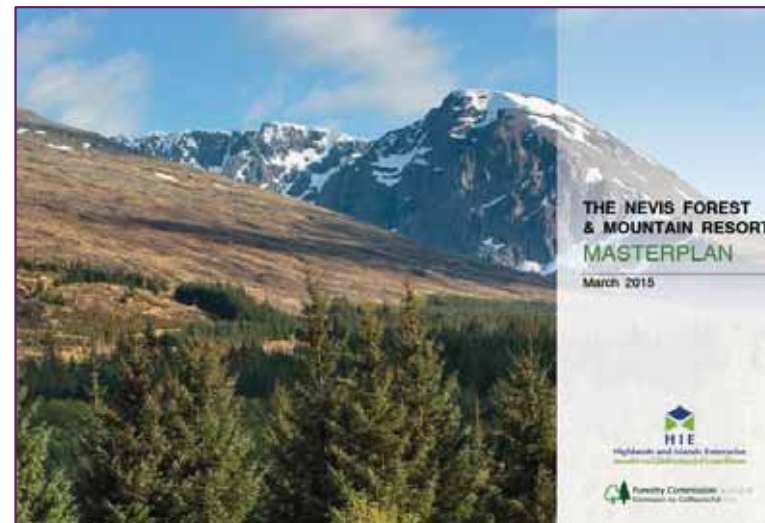
Action Plan



640 projects
£10.1 billion investment



NTDF in action – Master Planning in the forest



NTDF in action – A Social Distillery



NTDF in action - The "consequence" of foot and mouth disease



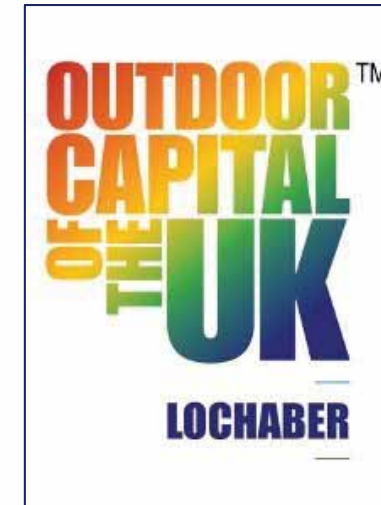
What Next?

**Mapping supply
Identify gaps**

**Overlay demand
Focus combined efforts**



A word on Destinations



A dramatic landscape photograph of the Callanish Standing Stones on the Isle of Lewis, Scotland. The scene is captured at sunset or sunrise, with a low sun partially obscured by dark, heavy clouds. Bright rays of light break through the clouds, creating a powerful, ethereal atmosphere. The standing stones, which are tall, rectangular, and weathered, are scattered across a grassy field. The foreground shows a mix of green grass and patches of reddish-brown heather. The sky transitions from a deep blue at the top to a bright orange and yellow near the horizon.

IT FEELS GOOD TO KNOW THAT SOME
MYSTERIES
WILL NEVER BE SOLVED.