

## DRAFT BUDGET 2014-15

### SUBMISSION FROM VISITSCOTLAND

#### Introduction to VisitScotland

VisitScotland is Scotland's national tourism organisation supporting the Scottish Government's Economic Strategy and the industry growth ambition detailed in the National Tourism Industry Strategy produced by the Scottish Tourism Alliance. Our purpose is to grow and develop the sustainable economic benefits of tourism to Scotland's economy.

The budget given to VisitScotland recognises the importance of tourism to Scotland's economy, the opportunities in 2014 and the legacy that VisitScotland is working with the industry to create.

Our core activities are:

- Marketing – to domestic and international visitors
- Information Provision - through literature, digital media and VisitScotland Information Centres (VICs)
- Quality Assurance – assurance provided to visitors and advice provided to tourism businesses.
- Encouraging increase business tourism through the Business Tourism Unit.
- Securing and supporting major sporting and cultural events through the events directorate EventScotland.

Included in this paper at Annex A is a helpful diagram, extracted from the Corporate Plan 2013/2016, setting out VisitScotland's contribution to the National Performance Framework.

VisitScotland aligned its corporate objectives and focused activity to contribute to several of the Scottish Government's Purpose Targets and National Outcomes. Chief amongst these for VisitScotland is delivering against National Outcome 1: *We live in a Scotland that is the most attractive place for doing business in Europe.*

Examples of this contribution can be seen in the following VisitScotland activity:

- The development and successful deployment of the Conference Bid Fund to drive and support key business tourism events;
- The partnership and collaboration with the city convention bureaux and the regions via the Business Tourism Unit and new or enhanced marketing platforms;
- Working with airports and carriers, and alongside Team Scotland partners (key are Scottish Enterprise and HIE), VisitScotland has identified and secured new and extended route connectivity for Scotland.
- The continued expansion of VisitScotland Expo, Scotland's premier business to business travel trade event;
- Again, with Team Scotland, we deliver the front door for Scotland in new and emerging markets, benefiting sectors beyond tourism.

Additional details are included in Annex B, which include further activities undertaken which contribute directly to the National Outcomes and are reproduced here from the Corporate Plan.

## **Marketing**

In 2012, almost 15 million overnight tourism trips were taken in Scotland, for which visitor expenditure totalled £4.3 billion, with a further £4.7 billion spent by day visitors, delivering £9 billion of expenditure.

Overseas residents accounted for around 15 per cent of the total number of tourism trips taken in Scotland, but 33 per cent of total visitor spend, underlining the value of attracting these visitors. USA, Germany, France and Ireland are long-time major markets for Scotland while over the last five years growth has been seen in non-Euro markets such as Norway and Switzerland.

VisitScotland prioritises its international markets according to the size of the potential market; propensity to travel of the country's population; direct access from these markets; interests of the target market's population and alignment with Scotland's product offering.

Recent results show that our 2012 'Surprise Yourself' and long haul campaigns brought nearly £310 million additional economic benefit for Scotland, representing a rise of 14 per cent on the same period the year before.

## **Business Tourism Unit**

Looking beyond leisure tourism, Scotland is enjoying a resurgence in the business tourism sector. The UK Economic Impact Study, commissioned by the Meeting Professionals International (MPI) Foundation, and published this summer, valuing the sector at almost £2 billion for the country, clearly demonstrating that business tourism is a key pillar of the economy.

VisitScotland's Business Tourism Unit (BTU) will continue to work with partners to ensure the continuation of this success story.

The main focus of the BTU is to promote Scotland as a destination for corporate conferences, professional associations' conventions, incentive programmes for high-achievers and exhibitions. VisitScotland's Conference Bid Fund is enabling the organisation to continue to expand work in this important area.

The Conference Bid fund committed just under £700,000 by August 2013 and is designed to attract conferences to Scotland and, working with local authorities and other public sector partners, has helped attract 34 conferences to Scotland over the next 7 years.

The number of visitors expected to attend these conferences is 47,200 with an expected gross expenditure by visitors to be around £78.4 million.

This activity coupled with the annual Scotland Means Business and other promotional activities targeting international conference organisers, will ensure Scotland continues to take full advantage of the global recovery in business tourism.

## **VisitScotland Information Centres (VICs)**

VisitScotland has a network of more than 100 VisitScotland Information Centres (VICs) and Information Points in Partnership spread throughout Scotland, welcoming more than 5 million visitors per year. The majority of the VICs are open all year however there are some which are seasonal and are only open from April to October.

Many VICs have undergone extensive refurbishment in the recent years as part of a rolling capital investment programme.

## **Quality Assurance Schemes**

Quality Assurance (QA) is a grading and classification scheme with almost 8,900 businesses taking part. The *grading* refers to the intrinsic quality of the business and its outputs. This is the Star award. The *classification* categorises the business by facilities and services, and type. The classification is represented by the Designator.

The main designators are Hotel, Small Hotel, Guest House, B&B, Budget Hotel, Country House Hotel, Inn, Camping Park, Holiday Parks, Touring Park, Hostel, Campus Accommodation, Scotland's Best Bars, EatScotland Visitor Attraction, Tour, Self Catering, Serviced Apartment, and Exclusive Use Venue.

## **Digital and media strategy**

VisitScotland is working to make VisitScotland.com the definitive guide to visiting Scotland, inspiring visitors through a single source covering everything our country has to offer.

Content from all over Scotland - from accommodation and restaurants to walking and wildlife - feature on the site, giving visitors the most comprehensive picture of Scotland ever produced. The improved website is part of VisitScotland's new digital and media strategy, focusing on improving the consumer experience and providing tourism businesses with opportunities to reach potential visitors.

Tourism businesses also have a quick and easy way to update their information as well as bringing in more tourism spend for individual businesses and their local economies.

From a consumer perspective, VisitScotland.com enhances the visitor experience through innovations including improved online booking, with plans for User Generated Content, and a geo-mapping facility which will provide them with richer information about Scotland.

There are many successes on the site including the integrations of the Surprise Yourself site, all regional sites, product sites and international gateway sites. New content, images and video have also been added. Overall there has been an increase in referrals to the tourism industry via VisitScotland.com - 400,000 since May.

The strategy was developed from extensive consumer research and focus groups to look at how we could improve the website for visitors. This includes European user testing of the site which is delivering excellent feedback.

## **Partnership working**

VisitScotland is committed to working together to encourage the right conditions for achieving sustainable economic growth by listening to insight provided by industry and using it to shape their offering and support. VisitScotland works with a range of partners and stakeholders including tourism businesses, industry bodies, including the Scottish Tourism Alliance, Destination Organisations, local authorities as well as offering businesses specialist advice through local teams and resources on VisitScotland.org. Funding is also provided through the VisitScotland Growth Fund to assist local businesses to work together to run promotional activity.

The years of focus, which have acted as the bridge between Homecoming Scotland 2009 and the major events and further Homecoming celebrations in 2014, have enabled the industry to continue to work collectively, creating a Team Scotland approach to tourism and the growth of the Visitor Economy. The results from these are detailed in the Winning Years report presented to the Committee earlier this month.

Taking a Team Scotland approach is critical to the ongoing success, of Scotland's Visitor Economy, with close work with colleagues within Scottish Enterprise and HIE crucial. The recently announced years of focus for 2015 through to 2018 will ensure this partnership work continues to put tourism and the visitor economy at the heart of Scotland's drive for economic growth.

The future years of focus are:

2015 - Year of Scotland's Food and Drink

2016 - Scotland's Year of Innovation, Architecture and Design

2017 - Year of History, Heritage and Archaeology

2018 - Scotland's Year of Young People

## **Major events/event tourism**

VisitScotland's events directorate EventScotland invested £3.3 million in Scotland's events industry in 2012/2013. This investment supported and secured 80 events and generated an estimated economic impact of £59.5 million for Scotland's economy.

The EventScotland team is also leading the delivery of The 2014 Ryder Cup and as part of this commitment we support an impressive portfolio of golf events each year, including The Scottish Open, The Ricoh Women's British Open and The Johnnie Walker Championship.

## **The opportunities ahead**

Scotland remains a leading tourism destination offering an unrivalled collection of experiences, many completely unique to the country. Each year visitors travel from across the world to experience the very best of holidays and hospitality, with many returning again and again.

VisitScotland is working with partners to ensure Scotland takes full advantage of the opportunities in 2014. We also believe that every public sector body, every tourism business and the wider Scottish population need to understand and work together to realise the potential of the country's most important industry.

As we move to 2014, Scotland is enjoying renewed growth in business tourism, improved infrastructure and increased interest from the emerging markets of India, China and Russia. There is also international recognition of VisitScotland's Quality Assurance scheme and our digital platform to promote Scotland.

Additionally, VisitScotland continues to lead delivery of the years of focus in the build up to and beyond 2014, as we will continue to invest in and secure world-class events for Scotland, promoting them in key visitor markets around the globe.

Tourism is the single biggest investment that can be made right now and can be a tonic for the recession. Investment in tourism is an investment towards economic recovery, sustainable growth and jobs.

This fact is recognised in the budget that has been provided to VisitScotland by the Scottish Government, which will allow the national tourism organisation to continue to deliver for Scotland and the tourism industry in the important years ahead.

### **Our priorities**

Our activity will see major marketing activity in Europe, North America and in emerging markets.

New marketing and campaign activity, including a television advert, will be launched in November as part of the existing drive to bring visitors to Scotland for 2014, with further Homecoming Scotland advertising set to be launched shortly after that.

Focus on attracting major international events to Scotland will continue with business tourism boosted through the Conference Bid Fund.

Partnership working will continue across business and with other public sector agencies to bring more investment in key areas of capital projects, transport, visitor access and to attract the next generation into a career in tourism.

There will also be continued support for businesses through helping them with routes to market and funding their marketing activity through the VisitScotland Growth Fund.

VisitScotland will work to ensure the highest return on these investments and continue to save on costs by working with public sector partners to identify and deliver shared cost saving activity.

VisitScotland will continue to assist the development of the Visitor Economy. For example, the Tourism Development Plan for Scotland: *Delivering for the Visitor Economy*, published earlier this year sets out a framework to assist and promote growth in Scotland's visitor economy to 2020.

The Plan is one of the measures to help co-ordinate and deliver future growth and defines proactive and co-ordinated approach to assist all stakeholders in the sector to engage in securing future opportunities.

## **A key investment**

Whilst enjoying success, it is vital that Scotland and the tourism industry do not become complacent and this is why VisitScotland continues to work hard to make the case for investment to boost tourism and the visitor economy.

Some key facts illustrate the scale of the industry and its importance to Scotland:

- Tourism expenditure totalled £9 billion in 2012.
- The wider visitor economy is estimated to be worth £11 billion annually, employing more than 200,000 people (according to an independent report published by Deloitte).
- Business tourism is a £2 billion industry and creates a bridge between leisure tourism and inward investment. It is also a growth area which Scotland is well positioned to take advantage of.
- As at March 2012, there were 13,730 tourism-related enterprises operating in Scotland.
- Just over half of tourism-related enterprises were small sized enterprises (1-49 employees), 16.1 per cent were medium sized (50-249) and 32.1 per cent were large (250+).
- 98 per cent of tourism-related enterprises are Scottish owned.

## **Budget overview**

The projected budgets are attached and show a clear commitment to develop and grow tourism in Scotland and to create a lasting legacy from the major opportunities presented in 2014.

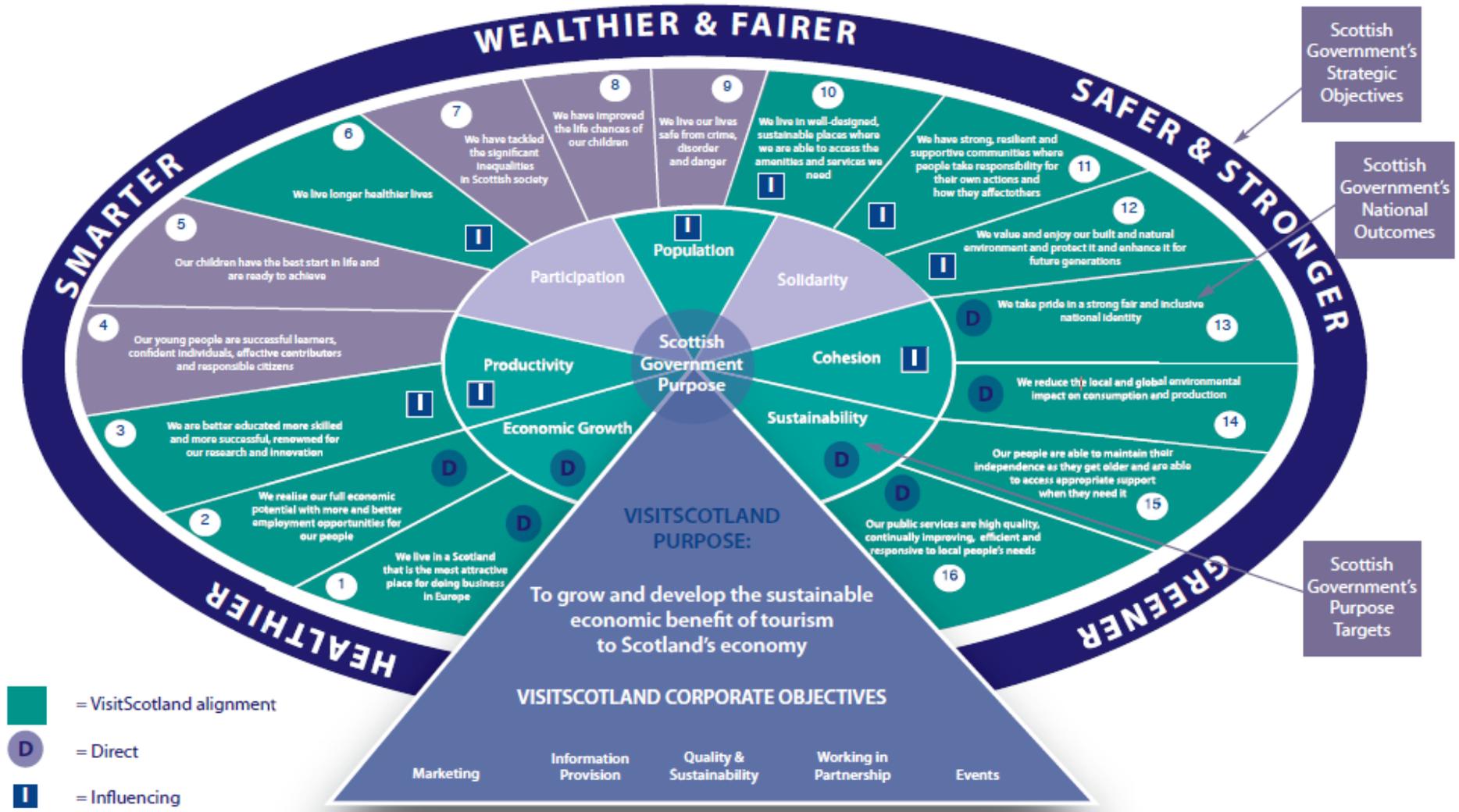
## **Conclusion**

VisitScotland will use the budget invested by the Scottish Government to continue to support tourism businesses by providing access to markets and customers, through destination marketing campaigns and by encouraging businesses to work together.

Scotland has some unique and inspirational opportunities ahead and VisitScotland will use its budget and partnership approach to ensure that the tourism industry and the country as a whole benefits from them.

Campaigns like 'Surprise Yourself', plus the major opportunities in 2014 will deliver economic growth and jobs to the country. VisitScotland will ensure its budget is spent to ensure the highest possible return on that investment.

**ANNEX A - OUR CONTRIBUTION TO THE NATIONAL PERFORMANCE FRAMEWORK**



**ANNEX B: TABLE SHOWS A RANGE OF ACTIVITIES VISITSCOTLAND UNDERTAKES CONTRIBUTING DIRECTLY TO THE NATIONAL OUTCOMES**

Direct NPF National Outcome - VisitScotland Objective and	Economic Rationale	Main areas of VisitScotland activity	Desired VisitScotland Outcome
<p><b>National Outcome: 1 Direct</b></p> <p><i>We live in a Scotland that is the most attractive place for doing business in Europe</i></p> <p><b>VisitScotland Objective:</b></p> <p><i>Marketing and Working in Partnership</i></p>	<p>VisitScotland promotes Scotland both as a destination for leisure and business visitors. Business Tourism is a key driver of growth and collaboration for Scotland, acting as the “bridge” between tourism and inward investment.</p> <p>Aligned to Scotland’s priority industries, business tourism attracts conventions, symposiums and incentive groups to the country and their influential delegates. These gatherings enhance Scotland’s credentials as a place to invest, study, live, work and visit.</p> <p>Our Business Tourism Unit (BTU) will build on partnerships with external stakeholders such as Scottish Development International (SDI) to increase the profile of the</p>	<ul style="list-style-type: none"> <li>• Use the Conference Bid Fund to drive and support the acquisition of key business tourism events across key Scottish Government target sectors including Renewables, Finance, Life Sciences, IT and Education.</li> <li>• Partnership and collaboration with the city convention bureaux and DOs in Glasgow, Edinburgh, Dundee and Aberdeen and the regions via BTU new or enhanced marketing platforms in the UK and overseas</li> <li>• With airports and carriers, and alongside Team Scotland partners, identify the opportunities and the support to bring about new and extended route connectivity for Scotland.</li> <li>• Deliver Expo, which is Scotland’s premier business to business travel trade event. Expo offers the perfect opportunity for all companies with a Scottish tourism product to showcase those products and services to potential buyers.</li> <li>• With Team Scotland we will deliver a ‘front door’ for Scotland in new and emerging markets, benefiting sectors beyond tourism, and use SDI contacts to access corporate business.</li> </ul>	<ul style="list-style-type: none"> <li>• Additional business tourism events (previously beyond reach) are actively pursued and won for Scotland using the Conference Bid Fund with resulting economic impact stretching outside of the immediate destination (city, town, resort) to regional and rural venues, services and support businesses.</li> <li>• Scotland’s seven cities are able to bid for specific conventions which would be beyond their reach without VS support in the bid process or VS marketing platforms. Conventions in the cities impact all of Scotland.</li> <li>• Improved direct access supports increases in inbound tourism and business connectivity for exporters.</li> <li>• Create sales platform for tourism businesses to engage with UK and International travel buyers and media.</li> <li>• Help the internationalisation of Scottish tourism businesses.</li> </ul>

	country and to make use of new infrastructure to create opportunities for inward investment across growth sectors.		
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Direct NPF National Outcome - VisitScotland Objective and	Economic Rationale	Main areas of VisitScotland activity	Desired VisitScotland Outcome
<p><b>National Outcome: 13 Direct</b></p> <p><i>We take pride in a strong fair and inclusive national identity</i></p> <p><b>VisitScotland Objective:</b></p> <p><i>Marketing, Information Provision, Working in Partnership and Events</i></p>	<p>VisitScotland marketing ensures the Scottish tourism brand galvanises a sense of pride, passion, self-belief and confidence among the people of Scotland. VisitScotland promotes Scotland all year round to leisure and business visitors, both nationally and internationally, and increases the profile of the country for inward investment.</p> <p>Scotland Welcomes the World will create a sense of pride in Scottish tourism amongst stakeholders and</p>	<ul style="list-style-type: none"> <li>• Surprise Yourself (SY) national campaign.</li> <li>• Business Tourism Unit (BTU) sales and marketing activity including exhibitions, workshops and sales missions.</li> <li>• Deliver International campaigns including Life Is Like and Meet the Scots and continue to maximise benefits from <i>Brave</i> movie and focus year campaigns.</li> <li>• Attracting, developing and sustaining a portfolio of world-class events for Scotland. Support for themed years.</li> <li>• Through various activities as part of Year of Natural Scotland, raise the profile of Scotland as a naturally abundant country and a world class tourism destination</li> <li>• Focus the eyes of the world on Scotland and what it has to offer from maximising the investment in major events such as the Commonwealth Games and Ryder Cup.</li> <li>• Our Digital Scotland project will continue to</li> </ul>	<ul style="list-style-type: none"> <li>• Generate additional tourism income for the Scottish economy through seasonal campaign.</li> <li>• Drive new business tourism into Scotland using new platforms to generate additional enquiries.</li> <li>• Position Scotland as a distinctive and desirable destination. Raise global awareness of Scotland's history and culture around the world and generate additional tourism income for the Scottish economy.</li> <li>• Build Scotland's reputation and expertise in relation to events.</li> <li>• Promote Scotland's natural assets on the world stage, increase international and domestic tourism.</li> <li>• Securing the legacy from Winning Years/Scotland Welcomes the World.</li> </ul>

	<p>the Scottish public to develop investment and sustainable growth in the industry</p> <p>Our local marketing campaigns sell Scotland - a national dish with local flavour - encouraging more people living in Scotland to discover their own country.</p> <p>EventScotland secures and supports major events within Scotland which have a positive impact on our global image and identity as a nation. EventScotland will also support events where Scotland has a strong historic, traditional and cultural impact.</p>	<p>build on the successes already seen throughout 2011 and 2012 in completely redeveloping the website www.VisitScotland.com, continuing to make it more inspirational and more user-friendly for consumers and businesses alike.</p> <ul style="list-style-type: none"> <li>• Through Explore Scotland campaign we will work collaboratively with local industry groups and stakeholders to help deliver regional marketing strategies to support regional tourism ambitions and growth objectives.</li> <li>• Working with transport providers, visitor attractions and activity providers to develop an Explore Passport.</li> <li>• Working with stakeholders we will promote the Scotland Welcomes the World message to develop interest and action in investing in tourism.</li> <li>• Support for Scotland Week.</li> </ul>	<ul style="list-style-type: none"> <li>• www.VisitScotland.com will be the definitive guide to Scotland, inspiring visitors through a single information source on everything the country has to offer.</li> <li>• Help consumers to decide where in Scotland to go, stimulating geographic spread and providing a platform for regions and destinations to be part of VS activity.</li> <li>• Grow the Scottish day trip market and increase visitor spend.</li> <li>• A Scottish population which understands the importance of tourism and generates the warm welcome required in 2014.</li> <li>• Provide a major platform to promote modern Scotland in US and Canadian tourism markets.</li> </ul>
Direct NPF National Outcome - and VisitScotland Objective	Economic Rationale	Main areas of VisitScotland activity	Desired VisitScotland Outcome
<p><b>National Outcome: 14 Direct</b></p> <p><i>We reduce the local</i></p>	<p>Tourism is a key driver for the Scottish economy, and has a special relationship with the environment and</p>	<ul style="list-style-type: none"> <li>• VisitScotland has adopted the Scottish Government procurement framework, the 'Procurement Journey', as the base process for procurement activity.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure sustainability is a key part of the management of our supplier base.</li> <li>• Integration of sustainable criteria</li> </ul>

<p><i>and global environmental impact on consumption and production</i></p> <p><b>VisitScotland Objective:</b></p> <p><i>Quality &amp; Sustainability and Working in Partnership</i></p>	<p>society compared with other economic activities. VisitScotland will continue to highlight the importance of growing tourism in a sustainable manner.</p> <p>Our procurement strategy aims to ensure that all procurement activity takes full account of the wider economic, social and environmental responsibilities within its processes.</p> <p>The redevelopment of our QA scheme will encourage businesses to change their operations to more sustainable practices.</p> <p>EventScotland's assessment of events, before and after funding, assesses the steps that the event organisers will take to reduce environmental impacts.</p> <p>Our Business Tourism Unit emphasises Scotland's</p>	<ul style="list-style-type: none"> <li>• Develop a framework for integrating sustainability measures into the QA scheme including food and drink and progress implementation, as well as provide appropriate support to businesses.</li> <li>• As part of the Carbon Management Programme (CMP) VisitScotland has set challenging targets to reduce its carbon emissions across all its business areas by 2015.</li> <li>• As part of Shared Services Initiative VS will work with Historic Scotland and Scottish Natural Heritage to deliver an agreed portfolio of Carbon reduction projects.</li> <li>• EventScotland promotes Scotland as a green events destination and provides event organisers with access to eventIMFACTS.com, an online toolkit created by EventScotland and UK partners.</li> <li>• As part of its support towards local communities and a low carbon economy VisitScotland will continue to promote local produce and services through our VisitScotland Information Centre network, and provide marketing partnership opportunities through local campaigns for local producers of food, craft etc.</li> <li>• Sustainability is now an integral element of the judging criteria across all categories for the Scottish Thistle Awards.</li> <li>• We will continue to monitor attitudes amongst businesses and consumers on</li> </ul>	<p>into our QA schemes will stimulate and support industry to maximise the business benefits of operating in a sustainable way.</p> <ul style="list-style-type: none"> <li>• VisitScotland's Environmental focus will be on reducing energy consumption/CO<sup>2</sup> emissions by identifying projects to ensure reduction in: <ul style="list-style-type: none"> <li>○ Staff Travel</li> <li>○ Utilities</li> <li>○ Print</li> </ul> </li> <li>• Development of agreed common sustainability criteria/tests for purchasing goods and services to reduce carbon footprint.</li> <li>• EventScotland support will go towards the promotion of green travel initiatives such as free coach travel from various locations to events.</li> <li>• Increase consumer and business demand for low carbon goods and services.</li> <li>• Sustainability is intrinsically linked with business success.</li> <li>• VS activity is carried out in a sustainable way, balancing the strands of Economic, Social and Environmental sustainability.</li> </ul>
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	credentials as a leader in green and sustainable products to the meetings and conference marketplace.	environmental issues, to help inform VisitScotland's activity planning.	
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Direct NPF National Outcome - VisitScotland Objective and	Economic Rationale	Main areas of VisitScotland activity	Desired VisitScotland Outcome
<p><b>National Outcome: 16 Direct</b></p> <p><i>Our public services are high quality, continually improving, efficient and responsive to local people's needs</i></p> <p><b>VisitScotland Objective:</b></p> <p><i>Working in Partnership</i></p>	<p>VisitScotland is committed to seeking greater efficiency, streamlined delivery, improved quality of public services and working collaboratively with other national/local organisations in Scotland with related remits and objectives.</p> <p>VisitScotland's Procurement Strategy aims to deliver increased opportunities for cost reduction and value management both internally and across partner agencies.</p> <p>We will use our expertise in marketing to help other</p>	<ul style="list-style-type: none"> <li>As a key member of the Strategic Forum Partners Efficiency Programme, collaboratively identify and deliver efficiency projects across Forum organisations.</li> <li>VS will look to maximise the use of its seasonal VIC network by offering the space to local charities and voluntary organisations over the close season.</li> <li>Continue with the programme to drive internal efficiency programmes through all areas of the organisation.</li> <li>Work with the extended public sector to deliver additional shared service efficiency programmes. For example VisitScotland will work with Scottish Natural Heritage (SNH), in jointly-funded campaign activity, to expand VisitScotland campaigns promoting relevant SNH consumer product and offerings (The Big 5, Scotland's Great Trails, Scotland's Natural Heritage etc). Further explore and deliver shared services opportunities in web development and digital marketing e.g. with</li> </ul>	<ul style="list-style-type: none"> <li>Contribute to savings of £20m, £25m and £40m over the spending review period 2012-2015.</li> <li>Better and more efficient use of VIC network in close season to the betterment of local communities.</li> <li>Achieve efficiency savings.</li> <li>Improved efficiency and effectiveness of marketing campaigns.</li> <li>Leverage volumes and secure benefits from economies of scale through harnessing combined sector purchasing power.</li> <li>Improved supplier performance and delivery of efficiencies.</li> <li>Help deliver better services and ensure tourism outcomes in Single Outcome Agreements (SOAs) are reflected in CPP plans.</li> <li>Increase the number of joint contracts in place for the purchase</li> </ul>

	<p>public bodies improve the efficiency and effectiveness of their marketing.</p>	<p>Historic Scotland and Skills Development Scotland.</p> <ul style="list-style-type: none"> <li>• VisitScotland will remain fully engaged with the collaborative efforts of Scottish Procurement and will participate in National Forums and User Intelligence Groups, where appropriate.</li> <li>• Develop, in consultation with key stakeholders, a consistent and appropriate contract and supplier management toolkit.</li> <li>• Continue to work with Community Planning Partnerships (CPPs), where invited to do so.</li> <li>• Expand on existing joint tendering processes for retail products with Historic Scotland and other agencies as appropriate.</li> <li>• We will work with local partners to ensure that we deliver visitor information services in the most effective and efficient way, looking for opportunities through co-locations and partnerships and developing new digital information channels.</li> </ul>	<p>of retail products.</p> <ul style="list-style-type: none"> <li>• An increase in private and public sector organisations wanting to work in partnership with VisitScotland to improve the return on marketing investment.</li> </ul>
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## 1. Financial summary by theme

Budget line	Corporate Plan 2013-14	Forecast Outturn 2013-14	Change £m	Explanation of changes
Marketing activities	47.50	48.79	1.29	
Partnership Engagement	5.10	4.26	-0.84	
Support Services	6.00	5.93	-0.07	
Capital Grant	2.00	2.35	0.35	
Total cash investment	60.60	61.33	0.73	

Budget line	Corporate Plan 2014-15	Projected 2014-15	Change £m	Explanation of changes
Marketing activities	49.00	50.11	1.11	
Partnership Engagement	5.00	4.10	-0.90	
Support Services	5.90	5.63	-0.27	
Capital Grant	0.70	1.05	0.35	
Total cash investment	60.60	60.89	0.29	

## 2. Reconciling with GIA

<b>VisitScotland</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014/15</b>
Scottish Government Funding (including Capital & non-cash)	51.46	51.01	52.97
Commercial Income	6.62	4.00	3.40
Retail Income	2.63	2.18	2.10
Local Authority Funding	2.37	2.17	2.00
ERDF income	0.85	1.75	1.50
Other income	1.39	1.70	0.40
<b>Total income</b>	<b>65.32</b>	<b>62.81</b>	<b>62.37</b>
Less non-cash	1.78	1.48	1.48
<b>Total cash</b>	<b>63.54</b>	<b>61.33</b>	<b>60.89</b>

## 3. Budget over time

<b>Cash terms</b>					<b>Change 13-14 to 14-15</b>	
<b>Budget line</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>		
	<b>Actual</b>	<b>Actual</b>	<b>Forecast</b>	<b>Projected</b>	<b>£m</b>	<b>%</b>
<b>Marketing activities</b>	47.11	51.64	48.79	50.11	1.32	3%
<b>Partnership Engagement</b>	4.87	4.34	4.26	4.10	-0.16	-4%
<b>Support Services</b>	6.37	6.24	5.93	5.63	-0.30	-5%
<b>Capital Grant</b>	1.12	1.32	2.35	1.05	(1.30)	-55%
<b>Total cash investment</b>	<b>59.47</b>	<b>63.54</b>	<b>61.33</b>	<b>60.89</b>	<b>-0.44</b>	<b>-1%</b>