

Scottish Countryside Access Network (SCAN)

Conference

November 2001

“Tourism is from Mars – Recreation is from Venus”



Economic Balance

Alex McKay, SNH

- The benefits of recreation are Health, Social, Environmental and Economic
 - Economic Benefits: Research to date; UK Day visits, Walking Survey, Cairngorms; Mountain Recreation, Economic Impacts of Hill Walking and Mountaineering, Overall Value of a Core Paths Network.
- A lot of money is being spent in rural areas.

- UK Day Visit Survey; In Scotland the survey population was 2000. It was shown that within the two weeks prior to the survey 30% of respondents had been out to the countryside or coast. In the previous 12 months this jumped up to 60%.
 - The main activity was walking with other activities including mountain biking.
- Walking Survey 2000: Walks for pleasure (not going to the shop)
 - In order of usage / preference;
 - Beach / cliff, Woodland, Farmland, Mountain, Parks, Town, Loch and River.

- The majority of walks were between 2 – 5 miles (50%) and only 3% were greater than 10 miles.
 - 80% of trips used private transport and 12% started from home.

- The volume of walks stands at 295 million generating £3.01 per walk, a total of £900 million spent on walks in the UK.

Balancing Marketing with Infrastructure Management

Rory MacLellan, Strathclyde University.

- Tourism images of Scotland are often natural and cultural images.
 - Public support mechanism for tourism
 - Who are the tourists?
 - What do they do?
 - Behaviour; Spending; interaction with the environment
 - Who (in the countryside) benefits and who pays? (i.e. food and drink are bought but that doesn't necessarily upkeep the paths maintenance)

- Types of tourism: Sustainable-, Rural-, Nature-, Eco- and wildlife-.
 - Visitors; tourists, leisure day visits, local users
 - Environmental attractions; natural, built and cultural environments.
 - Formal visitor attractions and open access attractions.

- Tourism and the Environment: relationship.
 - Environment is seen as the primary attraction
 - Environment as a "backdrop"
 - Environmental cost of tourism
 - Tourism's contribution to conservation.

- Measure the economic benefits to environmental attractions and how much goes back in: this has never been done.
 - Activities are usually shopping and visiting the built environment.
 - Active pursuits are very low on this scale; swimming (6%), etc.

- Tourism; important to the economy in rural areas.
 - Trends; indicate a decline in the last 3 years.
 - Landscape is the main element for attraction
 - Tourists are less active than the leisure day-trippers.
 - The countryside is something to do on holiday rather than the main reason.

- Impact analysis.
 - Environmental impact of recreation.

- Management and Protection.
 - Sustainable tourism has been accepted but with varied emphasis and interpretation.
 - Linking land management, visitor management, promotion and taxation to pay for the management of the landscape.

Plenary 1.

questions / answers

Alistair Lawson (SRoWAS); to Alex; If there is £,900 million worth of spend, strip away the fuel, food and drink, premises and profit....what is left?

Alex Mackay: That was not part of the study and subsequently not looked at.

Sheila Adams Visit Scotland HIE and the point of view of the hill walking survey; £,105 million spend, was the estimated impact, but £,54 million was the actual benefit that came to the area.

Bill Taylor SNH *The figures for the B+B's, Guest Houses link with the elderly population of walkers.*

Alex Mackay: It stayed similar throughout the course of the survey. ABC 1's tend to be the most but the age structure remained.

Nic Bullivant: *Summer '94 and '98 were bad, '96 was good. There is no reason for the slump in the figures. Mountaineering activity in Scotland increased in '95. There was a general decline in the mid 90's but mountaineering stayed steady. If there is a real change it is probably with the figures. Could it be that the sample size was too small?*

Alex Mackay: The sample of 2000 was too small. It is indicating changes, not a definite trend. There will always be anomalies. With '95 being hot, this has thrown the figures off. In presenting ideas on how things are developing; need local information, not just national. This would then give fuller statistic and not just a baseline.

June Cotton (Moray Footpath Network). The map and youth hostels doesn't line up. The accommodation that people stay in is dictated by what is there.

Alex Mackay: What you say is correct. 200 – 300 people commented on where they stayed in the survey.

Bill Wright (Chair). *Rory, can you shed some light on this? If the accommodation was not there. Then we can't see the benefit of bed nights?*

Rory: True. The economic benefits depend on what people have to spend their money on; infrastructure is very important.

Brenda Clough (PKC). *From the Dunkeld and Birnam Survey it was obvious that accommodation differs markedly from Alex Mackay's report. More people stayed in hotels.*

The walking survey 2000 was just Scotland?

Alex Mackay: Yes.

Mike Dales (MCofS). Mountaineering figures and the way research is carried out will make things differ. In '93 and '94, the Ranger Service on Ben Nevis carried out a study and placed people counters in the ground on the tourist path. Towards the end of '94 most people stayed at hotels, but it was 30%

down. The counter figures for '94 were the same as '93 so the Ranger Service carried out some calibration work on the summit. The figures for '94 were 30% down on those for '93. At the summit climbers were not arriving there, they were completing their climb then heading back down without going to the summit. Where the figures are collected can influence the results.

Hector McLean (SLF). There is some scepticism about the figures, but I will defend them. There has been a decline in numbers since the year 2000 with the strong pound and the price of fuel. Last year showed that hotels were up and self-catering decreased. A trend moving towards convenience holidays; easier to get a weekend break in a hotel than pay for a week of self-catering.

The future; The immediate trend as of 11th September is not known, but there will be a boom in Scottish tourism next year because of the public's fear with flying.

Bill Wright (Chair). *There are a number of health warnings here. What is the experience internationally?*

Rory: Using Scandinavia as an example for activity holidays; they are good at the conservation side of things but not so good at tourism. Sweden, Norway and Finland have excellent wide-open spaces, which are provided for locals, not tourists. Canada and the USA have this more integrated.

Iain McCall (Ramblers Association). *Relevant to the integrated points; Agricultural Policy, Walker's welcome etc. What effect could changed agricultural subsidies have in the countryside in the future?*

Rory: Post FMD there is recognition that tourism value of land is greater than its production value. Recreation, land management and tourism objectives should be part of subsidies; but not necessarily the Scottish Parliament that will influence this as the Common Agricultural policy is governed by Europe.

If farming continues to decline and they all turn to tourism as additional subsidy, this won't be good as there will be an over capacity on rural accommodation.

Sheila (VisitScotland) *£500 million in subsidies are put into Scottish agriculture. ; Rural economies are trying to survive post FMD. Land Reform and FMD have been a 'wake up call'. What does the management of the countryside mean now?*

Bill Wright (Chair). *Rory pointed out how compartmentalised we still are. Any suggestions about how to get over the problem? ... (No audience response).*

Rory. There is a new tourism strategy being prepared for Scotland - wait to see how good it is - but the points being discussed today need to be part of that.

Stewart Cameron (East Lothian Council). From a Local Authority perspective; we can provide and manage facilities at a local level; the managed ones are not always the ones that are promoted? Reported problems often include locked gates and muddy paths. How can the information collected help us?

Rory: Local Authorities are the main funders for local tourist boards, but not at a national level. There is also perhaps over representation of agencies but not the resources to maintain what is out there.

Bill Wright (Chair). SNH perspective?

Alex Mackay: Paths for All is the main tool. They are working with local Authorities to provide paths for local people and tourism. Ideally TIC's wouldn't promote stuff that isn't there. Need to be able to provide facilities; but there is a clash with the natural heritage; can't attract to areas with low capacity.

Andrea Partridge P4 Projects Tourists tend to visit built attractions and not go out into the countryside. Any idea why?

Rory: Not sure. Foreign visitors tend to want to visit something unique to that country; castles, etc. General countryside walks are however a very important supplementary element; people do value walking as a destination.

Bill Wright (Chair). In England and Wales people are uncertain as to where they can go creating fears. Similar work for Scotland?

Alex Mackay. A joint survey with the Scottish Executive on where people walk, would like to walk just been done as part of the preparation for new legislation; would they change patterns of use? NO. However, they would like better facilities.

The survey concentrates on residents not tourists.

Bill Wright (Chair). There is a general lack of awareness. 40% of visitors associate Scotland with walking and hiking, and once they've been here 68% see the opportunity for marketing....there is a big gap.

Rory: Not just in countryside there is a lack of awareness in other areas; golf as an example; tourists think you need a specific handicap to play the courses (e.g. Gleneagles, Troon), what about all the local authority ones not getting used?

Tourism Industry reaction to the Draft Land Reform Bill

John Dickson, Scottish Tourism Forum

- Represents the Tourism Industry; 28,000 businesses employing 180,000 people and generating £2.5 billion for the economy.
 - All tourism sides; include field sports, working...., Scottish Executive and HIE
 - Importance of outdoor recreation has often been forgotten about; rural economy relies on subsidies for agriculture and fishing.

- FMD, Access and Land Reform; Lack of support for the tourism industry
 - Numerous businesses were not happy at landowners shutting of access.
 - Access is a crucial component of tourism.
 - Access restrictions impact businesses both town and city and rural.

- Positive aspects of Draft Land Reform Bill; responsible use, SOAC etc.; local access for a, CPN's.
 - Suspension of access rights by landowners and local authorities will affect tourism

- 8% of the working population in Scotland work in tourism, rising to 12% in rural areas.

Scenario Planning (Crisis Management)
Roger Smith, Scottish Borders Enterprise.

- Always have options
- Keep positive
- Work together
- See crises' as a challenge
- See crises' as an opportunity.

Plenary 2 *questions / answers*

Brenda Clough (PKC). *Where did you get the money from to repair the bridge?*
Roger: Half from Europe and the other half was more difficult to come by; estate, etc. Be creative in finding funding sources.

SLF guy. *Contrast between Roger Smith and the tourism industry is that he recognises the problem, turns them into an advantage and finds a solution. In contrast the STF view the problems of unrestricted access and no responsibilities.*

John (STF). I am not a representative on access. Have been a volunteer ranger at a Regional Park so knows first hand about the problems. I am sorry if the STF view comes across like that, but there are good and bad on both sides.

Rory (Strathclyde University). *Scenario Planning / Networking. Views on a scale that would work....local or national?*

Roger: National ones are easy to set-up. Local ones require more work but there are greater benefits. Observations through FMD were that the actual reaction is that most have worked. Scotland was far better at dealing with it than England. Planning was better.

Alistair Lawson (SRoWAS). Too many organisations with their own agendas creating a vacuum with no commitment.

Roger; *Should there be a tourism Minister? Or perhaps John's (STF) answer is the answer?*
Bill.....Scottish Enterprise Follow up on Rory's audit. Key to improvements. Need for a tourism minister.

Stewart Cameron (ELC). The remit needs to be correct. FMD was looked at from a RoW and agricultural perspective, not a tourism one. The entities were different. The correct facilities are needed at all levels.

Iain Whitehead (Aberdeen C'side Project) *Tourism doesn't represent land or culture. Arrival at Glasgow International Airport; everything is bland, shops sell trash, in the highlands there are good crafts that reflect tradition and the environment.*

John (STF). If there was a minister for tourism they would only be a junior in Scottish Executive. Wendy Alexander who promotes life long learning has a higher profile. Would need to weigh up the positives and the negatives of this. The STF have their own views.

Bill Wright (Chair). *Criticism of the industry; How do we respond to the point about the Airport trash? How is Scotland sold to the wider world?*

Roger Cultural; leaders of local people on festival of walking (borders), locals guided walkers to things that only locals know about. You don't find out these things as a tourist. Local knowledge and culture is important.

Sheila Adams (Visit Scotland) 50% of visitors stay in B+B's; they want to understand more about the local area. There is a place for hotels and B+B's in rural areas, with more space for local crafts, etc.

Bill Wright (Chair) Benefits; tourism is often seen as a threat in the rural economy. Snowdonia has massive concern about tourism and the Welsh culture/language. Having a different language is seen as something positive to offer.

Peter Scott (Planning Consultant) Problem; walking and cycling tourism are 'Cinderella' markets. Niche markets are those such as golf. Very seldom play up cycling or walking or take in serious walks.

Bill Wright (Chair) How do we change that?

John (STF) There are many big players such as the TIC's, Local Authorities, and Local Enterprise Networks etc. The Funders! They are all honed in on the 'one-stop-shop' concept. If in tourism it follows people; split of responsibility is confusing. HIE – visitscotland are all moving forward. Scottish Enterprise Networks are moving in a different way.

Stewart Cameron (ELC). Difference between golf, cycling and walking is that the golf club is a business in charge of its product. Local Authorities look after roads, hence the difference. Local Authorities manage paths over someone else's land.

Bill..... (SLF)? How many people are here today from the tourism industry? (Not many) Do they recognise the access lobby? Could SCAN provide the link between Visitscotland and the access side of things?

Roger Smith: The Scottish Tourist Board don't understand walking
Bill Wright. Recreational bodies react to the point.

Andrew Ralton (SRoWAS). Roger Smith mentioned the EU document. From Leader II; there is the possibility of developing walking in rural areas. Private business sector, relating that to visitscotland; scotexchange (web) is a market niche. Summaries. Information is needed on where people can walk.

Geoff Atkins (SNH Access Officer) Tourism are not realising all the benefits they can get from walking; turn it into a better value tourist industry. Ranger services need to be on the ground and facilities and people have to be comfortable with where they can go; TIC, walking etc.

Bill Wright (chair). How much of the TIC's engage with the recreation lobby? How about the converse? (How much of recreation engage with tourism lobby?) Is there any scope for greater involvement?

John (STF) A number of organisations are represented here; walking and cycling are the mainstay.

Iain McCall..... (Rambler's Association) Local Access Forum are a way of increasing communication between tourism and recreational interests; if a land manager knew what grants were out there, would be of benefit. There doesn't appear to be much coordination.

Jane Cotton (Moray Footpath Network). Putting things into local government already trying to do so much and it's usually the same people and departments working on

things. Why does everything have to be split e.g. Community planning / Learning strategy / Health strategy? Should pull together. 'Trash' point of view; problem with non-trash; quality and culture (STB standards). B+B quality; implying 'tartan'. Local B+B's will be priced out and a lack of individuality if they all have to achieve these standards.

John (STF). Standards; if deliver a quality product you will get customers; standards cost money.

Andrea Partridge (P4 Projects). Will funding; role of business development in tourism; sectors; meetings. Cycling has huge potential but got laughed at by non-believers; cyclists spend twice the amount than car visitors.

Sheila Adams (visitscotland). Standards are very important; avoid them being bland, etc. Standards with an overseeing group; business; 2001. Review of National Tourism Strategy; responses; look at minimum entry qualifications for the STB. Efforts are held down by those not doing it. It is now biased towards a quality of service; being developed by the customers themselves. A niche market of one star or five star. People operate very nicely at one or two star.

Eleanor Lothian? (Abertay University). (Horse owner). These are another group with a desperate need for access and not currently being involved? Issues with horses and participation; there are currently 2.4 million riders in the UK and 1 million horses. Road safety issue. There have been six deaths between January and July this year. Add horse riders to walkers and cyclists.

Roger Smith. That fits into scenario planning; apologies for not mentioning horses.
Ann Fraser a representative on the British Horse Society is an Access Officer. The Borders are currently running a pilot project. Equestrian access is to be addressed at the same time.

Eleanor I am a member of the BHS; sees there being a huge need for local groups; equine tourism.

Clare Hamilton-Sturdy (Dundee City Council). In Dundee we are working on a local access forum.

Karen Beard (STF) This is a very wide body and happy to have access representation. Tourism is high on the government agenda. FMD, the decline of the tourism industry and work of the STF put it there. Henry McLeish is on the Thistle Awards. It is up to everyone to maximise their opportunities, if people come together with one voice by joining forces within the forum.
Products that have been highlighted and can move up the priority list; maximise on; it's all about networking and co-operating.

Walking Wild

Colin Simpson, Highlands of Scotland Tourist Board.

- In the 90's there was an emphasis on destination marketing (not activities)
 - 1999 Tourism Review.
 - 2000; niche marketing funds; walking (projects with £100,000 each)

- Walking Wild is the main walking promotion part of visitscotland targeting the following;
 - Who: Ramblers, long distance route walkers, package walkers and moderate walkers.
 - Where: UK (Scotland, England and Wales)
 - Benelux countries
 - Germany
 - How: Brochure, website, Exhibitions, Advertising, PR features and direct marketing.

 - When: Supplement in TGO (Dec 2001), Updated web pages (Dec 2001), Brochure (Jan 2002) and Exhibitions (Jan – Mar 2002).

- Current Issues.
 - Infrastructure; Paths: local networks & longer routes
 - Transport, sustainable circular routes, etc.
 - Facilities
 - Baggage transport
 - Access Legislation
 - Benefits
 - Potential problems
 - Publications
 - General changes in word tourism

A Tourism Operator's View
Dorothy Breckenridge, C 'n' Do

- Established 1984
- Education has always been a strong focus. The primary aim has been the environment otherwise there is over development in all the wrong areas. Economic benefits are there if it is done in a sensitive way.
- The £900 million mentioned earlier basically goes through all the recreational stuff and then into the Exchequer; where then?

- Develop a recreational strategy at both national and local level. This will help get the funding back.

- As a result of FMD many groups are now working together. Often however there is too much talk and not enough getting things done.
 - There are many opportunities to get people to come together.

- Education; needs to be involved more with the outdoors and the environment. Youngsters need to experience it.
 - Take tourism or recreation to all sectors of the government and keep lobbying; rural cash into the economy.

Dunkeld and Birnam Walks Network
Brenda Clough, Perth and Kinross Council.

- Established in 1984; 36 miles of path.
- Economic, social and environmental value.
 - Impact of the paths network on the local economy.
- There are 8 circular routes, development costs were £70,000. Maintenance costs are £3,500 per annum.
- There are 76,000 visitors to the network per annum, 43% are local and 53% are visitors/tourists. Each walking between _ and 2 hours.
 - Please contact Brenda directly if you wish to see more of the study.

The way forward.

Stuart MacKenzie, Paths for All Partnership.

- Scottish Tourism: the main points.
 - Scottish Tourism strategy
 - FMD
 - 11th September 2001.
 - Holiday bookings are down 50%

- Take the CIA approach: Control and Influence things you can, accept those you can't.

- The way forward:
 - Tourism Strategy review
 - The review is under performance
 - Compete in difficult conditions
 - Vision for tourism?
 - Agree targets and actions
 - Define roles and relationships
 - Tackle tourism seriously
 - Take access seriously.

- Tourism Challenges:
 - Change of culture and more.....
 - Customer centred
 - Coordination and leadership
 - Communication
 - Collaboration of sectors
 - Commitment to change

- Access Issues:
 - Information: market research
 - Marketing: niche and targets
 - Quality; products and service
 - Skills development training
 - Public sector
 - Private sector
 - Joined up thinking and action

- A way forward for access?
 - Need to develop:
 - Access opportunities
 - Tourism perspective
 - Partnerships locally
 - Marketing skills and tools 'promotional guide'
 - Evaluation techniques

- Anything is possible.

Plenary 3 *questions / answers*

Bill Wright (Chair). SLF. *The Walking Wild web site...what is on it? How do you link into visitscotland?*

Colin Simpson The aim of the site is to promote walking rather than individual walks. Routes come direct from walkers and tourism sponsored guides; e.g. walks they've agreed with the landowners in Argyll Loch Lomond Stirling & Trossachs Tourist Board series of guides. No link to visitscotland.co.uk yet it is due to be ready with reciprocal link by Dec - in effect one site. Having only one site will mean that it is easier to keep up to date.

Alistair Lawson (SRoWAS). *Fear; in facing the wrong direction; participation in outdoor pursuits and tourists to Scotland has perhaps plateaued out? Have we over recent years catered for a fixed clientele? Is it possible that there is a residual population who are not into outdoor pursuits and rather than advertise to the EU, we should perhaps be promoting a health campaign looking at general health and physical exercise.*

Jane Gordon (Moray Footpath Network) We are missing opportunities for getting young people involved. Make opportunities to take young families out

Clare Hamilton-Sturdy (Dundee City Council). Marketing changes are definitely needed to get there.

Bill Wright (Chair). *In terms of a marketing approach; youngsters can't get access.*

Colin (WW). Promote to families and Paths for All networks. Is good but need tourist facilities that welcome families.

Dorothy (C 'n' Do). *Suggested to the Scottish Executive that after FMD could support tourism and recreation industry by making provision for every school child to be out of doors for one week in the autumn. This then became a lost opportunity as the Exec said no money and it was the individual schools responsibility. It would have utilised recreation providers and accommodation. Perhaps next year?*

Rory (Strathclyde University). This is an information issue. The population of the urban areas are not targeted; messages are targeted to the rural, middle class population. Mixed messages are out there. Paths into cities?

Stuart MacKenzie (PFAP). This is very important, we do not know enough about our market. Alistair Lawson mentioned the sweaty physical market. This is a niche that needs to be recognised. There is a range of people not taking opportunities. This is our fault; there is tremendous scope. Looking at the market 69% of the population want to walk less than 2 miles, have walks close to home; these are complementary factors. Drumchapel; buggies etc. They are as entitled to have a PFAP network as anyone else. Haven't tapped the potential at all. Problems are opportunities in disguise.

Bill. *Drumchapel; has it extended further?*

Stuart MacKenzie. Yes it is on the edges of the Kilpatrick's project so the links are there.

People want to be able to leave their multi-storeys and cross the road onto the core paths network.
Paths to Health project; bringing the health benefits to people. The scope is enormous; it leads nicely onto tourism.

Brenda Clough (PKC). Around the city of Perth? There is a demand; cycle route from Perth to Dundee; there are many request to the TIC's and roads department. Information is required. Perth will be looked at after Blairgowrie. Cycling initiatives.
Money through transport.
Conference with the Health Education Board' difficulties; walking campaigns. Gavin Hastings walking for 30 minutes campaign; the follow up was that a lot of people heard about it, but the people it got to weren't the ones it was supposed to be targeting. These aren't the ABC 1's.

Andrew Ralton (SROWAS). There is a link between the social marketing and marketing for tourism. Local knowledge, heritage, owners and paths, etc. cultural tourism.
Historic Scotland is actively involved in pursuing the less well off. Adverts are going into the Daily Record to get people out into the countryside.
A properly marketed network will lead out to where people want to go.

*Bill Wright (Chair). Blairgowrie has the highest crime rate and social depravation in Tayside yet Loch Inver and Coulag Wood are a very good family destination.
Engaging the community to what extent? How much are the community at large involved and are the Ramblers Association involved?*

Brenda Clough (PKC) Dunkeld and Birnam walks; there was very little community consultation; it was all landowner. Crieff will be different; influenced by the PFAP idea; involving groups, individuals and communities. Pre consultation exercises, about to do a project, positive feedback and will maybe reduce the vandalism if done at a local level?

Iain McCall (Rambler's Association). Involve the communities, otherwise no paths will be identified; it's where they want to go.

Would like to see routes that don't follow paths; walk anywhere
*Bill Wright (Chair). It is easiest however to follow a network. Usual dog problems, but the issues of not being restricted are as a consequence. If you follow a network you will soon discover a number of routes, not waymarked leading off these.
Where do the benefits go? It's clear that the landowners don't get the money; it all gets spent in the shops.*

Bill Taylor? (*SNH). (SLF guy previously?) Upland footpath network. Nethie Bridge; Strathspey. Interpretative plan. Important to have routes in and around the village. The community know the places to go to and how to link them into a CPN. There will be the creation of a footpath network and a small orientation centre. A secure and well-formed footpath system that can be developed. Providing significant economic benefits and there is a desire to tell others about the local history.

Mike Dales (MCofS) Collaboration between sectors. Reason for the conference today is to reach out to these agencies, public bodies and academia. At a national level to get working together. A similar attempt was made by the Canadian Tourism Commission with both public and private sectors coming together on research, marketing etc. Not voluntary or academia though.
Ideas on how to get collaboration with other agencies? Bottom up, grass roots, etc., we are all doing it at this level just not above. Linking in with Dorothy's views we know what we want, we know what we have; we just need to get collaboration.

Dorothy Breckenridge (C 'n' Do). There are various networks and agencies. Get them to talk together. Put SCAN on the tourism forum and vice versa. So that we are not reinventing the wheel.

John (STF). There are often too many meetings. Money agencies have membership and can take things forward.

Stuart MacKenzie (PFAP) Something should come out of the tourism review; fragmentation etc. Hope that we don't need to create any other bodies. If to exist; what role will they play? Who will be in charge? There is too much competition; pecking order, banging heads together to make things work.

Bill Wright (Chair) Can this be done through the web? It is marketing!
Colin (WW) Think so. Continue to get people to speak together and use the results in a useful way. The web makes things easy to pass on. Make more use of the web; keep people involved. Scotexchange; industries website. Also visitscotland.com?

Bill Wright (Chair) Is there anyone who has not spoken who would like to do so?

Cathy Kinnear (SCAN). The Access Forum had the STB, etc. on it and it was working. In view of the Land Reform (Scotland) Bill, it should be started up again. It has got the ear of the Scottish Executive and can put forward political issues. We have all the groups here today. Private have more lever ship over the government than the public agencies do.
Local communities have people in industry that can make things move up the political agenda. We need to move and shake! Don't minimise our ability.
B+B owners are small scale but can make it onto a local forum.
Local Access Forums; it is essential that there is some representation of access and tourism.
Trader's Associations, Enterprise Companies.
Local Authorities lost power when the money went to the LEC's
Gather these in, it is an issue. Focus on access. Gather together all the political buttons. Industry can do it easier than local authorities.

Dorothy Breckenridge (C 'n' Do). Things have started moving. Because of FMD there is better communication in industry, local authorities and local enterprise companies. These still need pushed however. Once they've overcome one problem can then move on to the next thing.

Importance of the issue is that they are strong enough; local initiatives;
keep pushing at it.
Access Forums are politicising just now; request to resume.

Bill Wright (Chair). SUMMARY

- This has been a tremendous opportunity for SCAN, Scottish Executive / Parliament, but it has shown that there is still a huge amount of work to go. Recreation is of a tremendous value to the tourist industry.
- There is still Compartmentalisation, which needs to be addressed for things to be truly successful.
- Outdoor recreation has no strategy; but many strategies that are developed are disintegrated.
- Who benefits from the additional economy? Not necessarily the private owners on whose land the paths are frequently it is the shops and hotels that do.
- ***Sound bites include:***
 - Availability of something to spend money on.
 - New innovations; bikes on buses
 - Land reform is contentious
 - Tourist industry should be clean, green and welcoming
 - FMD problems should become opportunities
 - Remember the lessons learnt this time.
 - There is a need for leadership; develop the tourist industry, manage the landscape and provide for recreation.

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