Hospitality:
driving Scotland's local economies

A Report by the British Hospitality Association

OCTOBER 2011

BRITISH HOSPITALITY Association

Contents

The British Hospitality Association, incorporating The Restaurant Association, is the national trade association for the hotel, restaurant and catering industry. It has in membership almost every publicly quoted hotel group, many independent hotels, restaurants and clubs, major food and service management companies, motorway service operators and many local hospitality associations, as well as hospitality education establishments. In total, it represents more than 40,000 establishments with over 500,000 employees across the UK.

The association promotes the interests of the entire hospitality industry to government ministers, MPs and MEPs, members of the Scottish Parliament and Welsh Assembly, the EU Commission, the City and the media.

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policy@bha.org.uk

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Published by:
British Hospitality Association
Queen's House
55/56 Lincoln's Inn Fields
London WC2A 3BH

Tel: 020 7404 7744
Fax: 020 7404 7799
E-mail: bha@bha.org.uk
www.bha.org.uk

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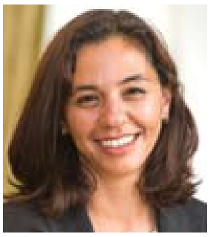
Foreword

The significance of the hospitality industry to the local economies of Scotland is well known but poorly documented. Hotels, guest houses, restaurants and cafes, pubs and clubs, and attractions play a vitally important role in the economic and social life of communities throughout the country, but exactly how important is hospitality to each local economy?

Calum Ross
Chairman
BHA Scotland



Ufi Ibrahim
Chief Executive
BHA

In a study, commissioned by the British Hospitality Association and undertaken by Oxford Economics, we identify each local authority in Scotland and the contribution made to it by the hospitality industry in terms of employment and Gross Value Added – that is, net wealth creation.

The picture that emerges is clear: the hospitality industry is a key contributor to every local authority's economic livelihood and particularly to its job-creation and wealth-creating potential.

Looking to the future, we want the Scottish Government, Scottish Parliament and local authorities to recognise this and put in place policies that enable the industry to contribute even more to Scotland's local and national wealth. Our ten-point Call to Action identifies these policies.

As the report reveals, over 110 new hotels have been built in Scotland in the last decade with investment reaching £3bn-plus. There has been much refurbishment of existing properties and new restaurants and attractions have opened. More investment is planned for the future.

But this investment needs to be matched by the support that hospitality businesses receive from local authorities and parliament.

Hospitality is clearly a key element in the development of every local economy and in its sustainable growth. In every local plan, it must be seen as an essential part of the area's economic structure. This is the challenge which is facing Scotland. It is a challenge that needs a strong partnership between the hospitality sector, every Scottish local authority and the Scottish Government.

Executive summary

- The hospitality industry is one of the main pillars of the Scottish economy and the economic driver of almost every part of the country.

- Hospitality directly employs over 220,000 people and, indirectly, a further 120,000 – 8.6 per cent of Scotland's jobs. It accounts for £4bn to the Scottish economy in wages and profits (Gross Value Added – GVA).

- Hospitality can create 46,000 jobs by 2020 providing the right supportive framework is created. Those local authorities in Scotland with the highest levels of direct hospitality employment are projected to create the largest number of net additional hospitality jobs.

- Hospitality's wealth-generation and job-creation potential is spread throughout Scotland with towns, cities and especially rural areas benefiting from its activities. It also plays a significant role in the social and cultural life of every community.

- In terms of direct hospitality employment, the largest local authority areas are Glasgow and Edinburgh, followed at some distance by Aberdeen; employment in rural areas is more spread-out. But, as a percentage of total employment, Highland and South Ayrshire are the authority areas most dependent on hospitality in terms of employment – not far off one job in every five. In no local authority area does this number fall below nine per cent (Table 2).

- Edinburgh and Glasgow are also the areas that contribute the greatest Gross Value Added to local economies but hospitality is a major contributor to wages and profits in all key tourism areas (Table 4), especially Highland and Argyll & Bute.

- 110 new hotels, at all price levels, have opened in Scotland since 2000 and more are planned to open in the next few years. With the refurbishment of existing properties, this represents an investment of well over £3bn. Future investment is endangered because of the reluctance of banks to fund new hotel projects, extensions and refurbishments.

- The Scottish Parliament, local authorities and Scottish Enterprise/ Highlands and Islands Enterprise must recognise that the industry is able to create jobs – at all skill levels – as effectively as other sectors of the economy. Investment in creating an industry workforce with appropriate skills, is critical. They must also recognise that the on-going promotion of tourism areas is as important to their growth as attracting capital investment.

- Funding for VisitScotland should be regarded as a necessary investment, central to the success of Scottish tourism, the Scottish hospitality industry and the Scottish economy.

- The UK's high rate of VAT on accommodation and attractions makes Scotland uncompetitive with the rest of Europe. All but two other member states of the EU have a reduced rate for accommodation and many also have a reduced rate for attractions and restaurant meals.

- Other barriers to growth include the difficulties and cost of obtaining a visa for visitors from potentially large source countries such as China and India; the rising cost of Air Passenger Duty is a further inhibitor. A significant lack of broadband accessibility both cabled and mobile, especially in rural areas, is another significant barrier.

1 What is the hospitality industry?

Hospitality is one of the main pillars of the Scottish economy and the economic driver of almost every part of the country. It has a disproportionate share of the UK tourism and hospitality industry per head of population, which testifies to the attractiveness of the country as a destination of choice and to the work of government at all levels and the industry to attract visitors.

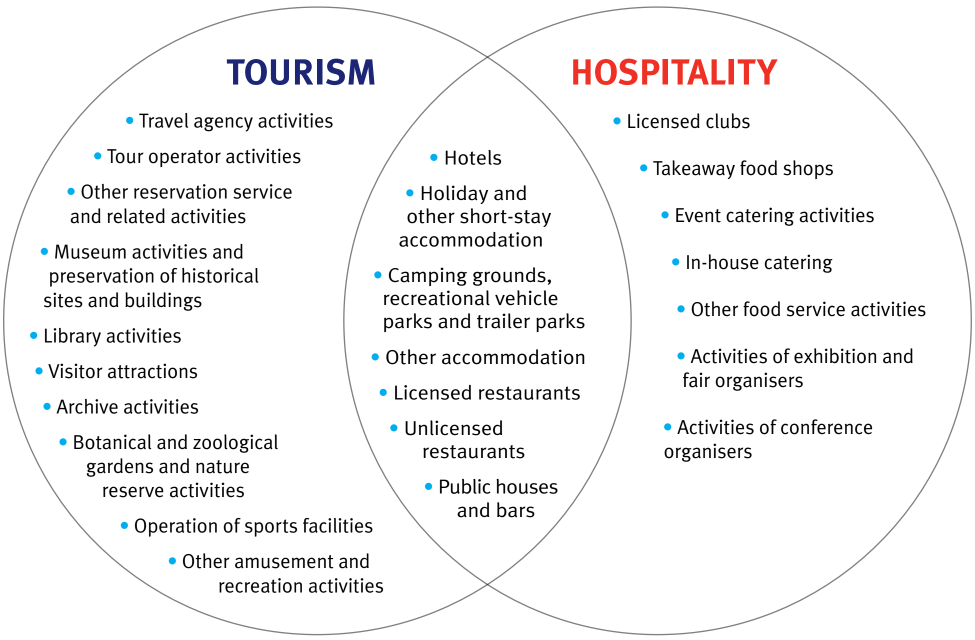
In the UK, hospitality is the fifth largest industry, directly employing over 2.4m people and, indirectly, a further 1.2m.

In Scotland, it directly employs over 220,000 people and, indirectly, a further 120,000.

Over 20,000 hospitality businesses provide 8.6 per cent of Scotland's jobs – only London of all UK regions has more hospitality jobs per 1,000 resident population – contributing to almost £11.2bn in tourism turnover and £4bn to the Scottish economy in wages and profits (Gross Value Added – GVA).

A key strength of the industry to Scotland is that its wealth and job-creation potential is spread throughout the country with towns, cities and rural areas all benefiting from the activities of hotels, restaurants, pubs, other catering businesses and events. But not only is hospitality critical to the success of local economies, it also plays a significant role in the social and cultural life of every community.

By any measure, hospitality is an active engine of travel and tourism to and within Scotland. Without a dynamic hospitality economy, the country cannot enjoy a thriving tourism industry.



THE HOSPITALITY ECONOMY INCLUDES:

Hotels and related services Including camping grounds and other accommodation.

Restaurants and related services including pubs, takeaway food shops, licensed clubs, and motorway service areas where hospitality services are the main activity for the latter.

Catering including contract catering to both private and public sector clients, and in-house catering across non-hospitality sectors, such as healthcare and education.

Event management including conference and exhibition organisation.

And temporary agency employment across these sub-sectors.

2 Hospitality in Scotland

In October 2010, the BHA published its report *Creating Jobs in Britain: A Hospitality Economy Proposition*, produced by Oxford Economics, in which it committed to developing a partnership with the industry and the government in order to create 236,000 new jobs throughout the UK including 43,000 in Scotland, by 2020 – providing the right supportive framework was created.

As a follow-up to this report, the association commissioned a further study by Oxford Economics to assess the economic contribution of the industry at local authority level. *The report – Local Economic Contribution of the UK Hospitality Industry* – forms the basis of this publication.

This contribution was measured in terms of:

1. **Direct employment in the hospitality industry.**
2. **Employment including direct and indirect (those jobs supported indirectly in the supply chain).**
3. **Gross Value Added (GVA) of the hospitality industry.**

What IS GVA?

Gross Value Added is the sum of wages and profits in hospitality and is used here because it measures the net contribution of the sector to the economy since it is the difference between the goods and services offered by the sector less the value of inputs used to produce them. The turnover of the sector in each local authority is approximately 2-2.25 times GVA.

> ***'THIS GOVERNMENT IS DETERMINED TO PROMOTE SCOTLAND AS A PREMIER WORLD DESTINATION.'***
>
> Rt Hon Alex Salmond MSP, First Minister of Scotland

Both the British and the Scottish Governments recognise the importance of tourism, of which hospitality is an integral part. The Prime Minister, David Cameron MP, made it clear in a speech in August 2010 that income from tourism was "fundamental to rebuilding and rebalancing the UK's economy".

This was further developed in the British government's tourism strategy, published in March 2011, where the Prime Minister stated that he wanted to "take tourism in Britain to a whole new level and harness the huge potential this area holds to grow our economy."

His comments were matched by the First Minister of Scotland, Alex Salmond MSP, when he said, "This government is determined to promote Scotland as a premier world destination."

BHA Scotland welcomes the enthusiastic support which the industry has received at both a Scottish and UK level, but it recognises that there are significant barriers to growing the Scottish hospitality economy – chiefly the UK's lack of price competitiveness. According to the World Economic Forum's latest Travel and Tourism Competitiveness Index, the UK ranks 135th out of 139 countries on price competitiveness. Growing the hospitality economy of the UK depends on improving this position so that the whole UK economy, including Scotland, can benefit.

Hospitality – impact on local economies 3

The value of the visitor economy to the four countries of the UK is well known. In total, domestic and overseas visitor spend is approximately £38bn – see Table 1.

Table 1: **Spend by overseas and domestic visitors to English regions, Scotland, Wales and Northern Ireland.**

Region	Expenditure £bn (total domestic and overseas visitor spend, 2009)	Direct employment in hospitality 2010
ENGLAND	30.83	2,045,470
SCOTLAND	4.08	222,083
WALES	1.78	112,227
NORTHERN IRELAND	0.74	60,803
TOTAL	**37.43**	**2,440,583**

But how important is the hospitality industry to each local authority in terms of employment, and how much is this contribution worth? Using the results of the Oxford Economics research the following tables and commentaries provide a complete picture of the contribution of the hospitality industry to the economy of every local authority in Scotland.

They illustrate the critical importance of the industry to wealth and job creation throughout the country.

How many people does hospitality employ in Scotland's local authority areas?

In terms of direct hospitality employment (Table 2), by far the largest local authorities are Glasgow and Edinburgh, followed at some distance by Aberdeen; employment in rural areas is more spread-out. But, as important as the total number of employees, is the percentage of total employment. This indicates the relative importance of hospitality to the economy. As a percentage of total employment (direct, indirect and induced), Highland and South Ayrshire stand out as the authorities most dependent on hospitality in terms of employment – not far off one job in every five. Argyll & Bute and Perth & Kinross are also heavily dependant. In no local authority area does this number fall below nine per cent. >>>

Table 2: **Hospitality employment – Scotland (2010).**

Rank	Local Authority	Direct employment	Indirect and induced employment	% Direct, indirect and induced employment to total
1	Glasgow City	35,358	18,346	12.8
2	Edinburgh, City of	32,387	16,826	15.1
3	Aberdeen City	16,703	8,171	13.7
4	Highland	13,923	7,792	18.9
5	Fife	11,260	6,603	12.9
6	South Lanarkshire	9,271	5,403	11.4
7.	North Lanarkshire	9,126	5,327	10.7
8	Perth & Kinross	8,125	4,256	16.5
9	Aberdeenshire	7,223	3,826	10.5
10	Renfrewshire	6,408	3,526	12.3
11	Dundee City	6,328	2,911	11.8
12	South Ayrshire	5,879	2,957	17.2
13	Dumfries & Galloway	5,638	2,836	12.7
14	Argyll & Bute	4,980	2,762	16.7
15	Stirling	4,973	2,862	15.6
16	West Lothian	4,881	2,854	9.4
17	Falkirk	4,609	2,323	11.3
18	North Ayrshire	4,351	2,266	15.3
19	Scottish Borders	4,116	2,113	12.5
20	Angus	3,227	1,672	11.4
21	Moray	3,053	1,562	10.9
22	West Dunbartonshire	2,984	1,637	13.6
23	East Lothian	2,806	1,557	14.2
24	East Ayrshire	2,653	1,530	9.3
25	East Dunbartonshire	2,136	1,212	12.9
26	Inverclyde	2,125	1,221	11.4
27	East Renfrewshire	1,858	897	12.3
28	Midlothian	1,831	977	9.4
29	Orkney Islands	1,037	588	12.1
30	Shetland Islands	962	597	9.0
31	Clackmannanshire	953	545	9.3
32	Eilean Siar	917	511	11.9

Here, we define indirect employment as those jobs sustained in the supply sector of the industry, for example food and beverage manufacture, business services such as advertising and market research, agriculture and communications. Induced employment represents those jobs sustained by the spending of direct and indirect persons employed, such as jobs in retail outlets, companies producing consumer goods and a range of service industries.

In terms of a UK-wide comparison, Glasgow and Edinburgh are both within the top five UK authorities for direct hospitality employment (Table 3).

UK comparison

Table 3: Direct hospitality employment in the UK – top 10 local authorities (2010)

Rank	Local Authority	Direct Employment
1	Westminster	86,400
2	Birmingham	36,800
3	**Glasgow City**	**35,400**
4	**City of Edinburgh**	**32,400**
5	Manchester	31,100
6	Leeds	30,400
7	Cornwall	28,600
8	Camden	28,300
9	Liverpool	21,500
10	Kensington and Chelsea	21,100

Which areas in Scotland earn the most from hospitality?

Looking at the contribution of the hospitality industry in Scotland to total Gross Value Added, the top ranked areas are also predominantly major cities with Edinburgh and Glasgow easily the largest. But when we look at the percentage of direct, indirect and induced hospitality GVA to total GVA (Table 4), a different picture again emerges. Here, it is clear that hospitality is a major contributor to wages and profits in all key tourism areas, but especially in more rural areas like Highland, Argyll & Bute, South Ayrshire and Perth & Kinross. There is a clear correlation between visitor numbers, levels of employment and GVA.

Table 4: What the hospitality industry is worth to each local authority in GVA.

Rank	Local Authority	GVA of direct, indirect and induced employment £m (2005 prices)	% of direct, indirect and induced GVA to total
1	Edinburgh, City of	1,405	10.0
2	Glasgow City	1,328	8.8
3	Aberdeen City	643	9.4
4	Highland	526	19.1
5	Fife	428	9.2
6	Perth & Kinross	330	13.9
7	South Lanarkshire	329	7.3
8	North Lanarkshire	317	6.9
9	Aberdeenshire	308	8.0
10	Renfrewshire	255	8.2
11	South Ayrshire	253	15.6
12	Dundee City	227	8.3
13	Dumfries & Galloway	222	12.0
14	Argyll & Bute	217	16.7
15	Stirling	191	12.1
16	West Lothian	189	6.4
17	Falkirk	174	6.4
18	North Ayrshire	155	10.9
19	Scottish Borders	138	10.6
20	West Dunbartonshire	125	9.5
21	East Lothian	116	10.5
22	Angus	113	8.6
23	Moray	100	10.7
24	East Dunbartonshire	88	8.0
25	East Ayrshire	81	6.6
26	Midlothian	72	6.8
27	Inverclyde	63	6.9
28	East Renfrewshire	61	8.8
29	Shetland Islands	39	8.4
30	Orkney Islands	37	11.8
31	Clackmannanshire	37	6.3
32	Eilean Siar	34	12.3
	TOTAL	**8,601**	**9.5**

What are the barriers to growth?

Fiscal policies

The high rate of UK VAT on hotel accommodation is a significant deterrent to national growth and job creation. Member states of the EU recognise that tourism is an extremely price-sensitive sector, subject to intense international competition; as a result, all but two others (Denmark and Slovakia) have a reduced rate of VAT on accommodation. They recognise that the direct revenues foregone as a result of the reduced rate concession are compensated by the additional demand that reduced rates generate, and the creation of new jobs.

France, for example, has a reduced rate on accommodation at 5.5 per cent (which is now applied to restaurant meals); Germany's rate is seven per cent and Italy's rate is 10 per cent. Fourteen other countries have also introduced a reduced rate for restaurant meals and for admission to amusement parks.

The latest country to reduce VAT on hotels, restaurants and other tourism establishments is the Republic of Ireland, where VAT is being reduced to nine per cent from 1st July 2011 until December 2013. This reduction, from the already low 13.5 per cent, will be even more uncompetitive vis-à-vis the Republic of Ireland than it was before.

These low rates of VAT for accommodation make the whole of the UK, including Scotland, uncompetitive compared with the rest of Europe. This will remain the

Table 5: Rates of VAT in EU member states.

	VAT at standard rate (%)	Rate of VAT for hotel accommodation (%)	Rate of VAT for admission to amusement parks (%)	Rate of VAT for meals in restaurants (%)
Austria	20	10	10	10
Belgium	21	6	6	12
Bulgaria	20	9	20	20
Cyprus	15	8	5	8
Czech Republic	20	10	10	20
Denmark	25	25	25	25
Estonia	20	9	20	20
Finland	23	9	9	13
France	19.6	5.5	5.5	5.5
Germany	19	7	19	19
Greece	23	6.5	13	13
Hungary	25	18	25	25
Ireland	21	9	9	9
Italy	20	10	20	10
Latvia	22	12	22	22
Lithuania	21	9	21	21
Luxembourg	15	3	3	3
Malta	18	7	18	18
Netherlands	19	6	8	6
Poland	23	8	8	8
Portugal	23	6	6	13
Romania	24	9	9	24
Slovakia	20	20	20	20
Slovenia	20	8.5	8.5	8.5
Spain	18	8	8	8
Sweden	25	12	25	25
UK	20	20	20	20

Note: *This table is simplified; some countries have variations in their rate for particular items and services; most countries do not reduce the rate of VAT on alcohol taken with meals even if there is a reduced rate for the meal itself.*

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case for as long as VAT remains at the present high rate.

The high rate of VAT exacerbates the rising cost of travel and transport which represents a particular disadvantage to remote and rural businesses in Scotland. Rising fuel prices are making it increasingly expensive for visitors to travel to these destinations.

What benefits will accrue if VAT is reduced?

Reducing VAT will attract more overseas visitors to Scotland as well as encouraging more British people to holiday here, thus boosting demand. The principal benefit of this to the Scottish economy will be the creation of more jobs and greater wealth. An independent study by Deloitte forecasts that if VAT is reduced to five per cent, 43,000 full-time equivalent jobs will be created in the Scottish accommodation sector alone.

Other fiscal policies

Other fiscal policies also negatively impact on the hospitality industry; these include visa charges and Air Passenger Duty.

Through visa controls, visa charges make the UK difficult and expensive to access for some of our key target markets such as China, India and other growth economies. Being outside the Schengen Agreement, the UK imposes an additional charge on visa processing which acts as a deterrent to those travellers who would like to visit Scotland while travelling to countries within the Agreement.

Delays in visa processing by the UK are identified as that most likely to cause potential visitors to give up on their travel plans. In a survey by the European Tour Operators Association, 58,000 tourists cancelled their trips to the UK in 2009 owing to slow visa processing; ETOA estimates that nearly 314,000 decided not even to apply. In this scenario, Scotland also misses out.

APD is another tax that inhibits travel both north and south of the border and thus reduces visitor numbers. Although it raises prices for British residents travelling abroad – which potentially might benefit the domestic industry by discouraging overseas holidays – APD is also levied on overseas visitors leaving the UK (including Scotland) making visits that more expensive.

If the value of sterling against the Euro had not been so strongly in UK tourism's favour in the last five years, thus reducing the relative cost to the European market of visiting the UK, the impact of APD would have been significantly more damaging to Scottish tourism than it has been. Nevertheless, it remains an inhibiting factor and will certainly become even more regressive when (rather than if) APD is increased.

These fiscal policies particularly affect Scotland because of the decline in the proportion of total UK tourism expenditure spent on holidays north of the border to holidays abroad. The number of domestic visitors to Scotland has fallen from 13.75m in 2006 to 12.4m in 2010, although spend is up marginally from £2.61bn to £2.63bn.

What of the future for the Scottish hospitality industry ?

Overall, those local authorities in Scotland with the highest levels of direct hospitality employment are projected to create the largest number of net additional hospitality jobs by 2020. Table 6 shows the forecast growth in the total number of new jobs created in hospitality in Scotland between 2010 and 2020. Across the UK, the growth between 2010 and 2020 is estimated at 475,000. Scotland represents 45,219 of this number.

Policies for growth

BHA Scotland's Call to Action highlights the policies that must be adopted and the actions that must be taken if growth is to be encouraged, investment stimulated and jobs created in the hospitality industry. The industry will then be able to play an even more important role as the economic driver of local economies throughout Scotland than it has in the past.

But its job-creation and wealth-generation targets can only be reached if the national and Scottish governments provide the right framework in which it can prosper.

Removing the barriers to growth will enable the industry to make its full contribution to Scotland's national economy and its local economies. The opportunity is there to be grasped for the benefit of the whole nation.

Table 6: Direct hospitality employment in Scotland's local authorities in 2010 – and how they will grow by 2020.

Rank	Local Authority	Number in direct employment (2010)	Number in direct employment (2020)
1	Glasgow City	35,358	42,295
2	City of Edinburgh	32,387	38,794
3	City of Aberdeen	16,703	19,715
4	Highland	13,923	16, 657
5	Fife	11,260	13,464
6	South Lanarkshire	9,271	11,082
7.	North Lanarkshire	9,126	10,810
8	Perth and Kinross	8,125	9,718
9	Aberdeenshire	7,223	8,615
10	Renfrewshire	6,408	7,652
11	Dundee City	6,328	7,528
12	South Ayrshire	5,879	7,059
13	Dumfries & Galloway	5,638	6,788
14	Argyll and Bute	4,980	5,978
15	Stirling	4,973	5,965
16	West Lothian	4,881	5,811
17	Falkirk	4,609	5,518
18	North Ayrshire	4,351	5,195
19	Scottish Borders	4,116	4,877
20	Angus	3,227	3,861
21	Moray	3,053	3,656
22	West Dunbartonshire	2,984	3,570
23	East Lothian	2,806	3,362
24	East Ayrshire	2,653	3,169
25	East Dunbartonshire	2,136	2,582
26	Inverclyde	2,125	2,533
27	East Renfrewshire	1,858	2,234
28	Midlothian	1,831	2,191
29	Orkney	1,037	1,244
30	Shetland Isles	962	1,143
31	Clackmannanshire	953	1,131
32	Eilean Siar	917	1,096
	TOTAL	222,081	265,293

5 BHA Scotland: call to action

BHA Scotland, with its members, has set the agenda summarised below and detailed in this report, which is to work towards the objective of creating wealth, prosperity and jobs in every local authority in Scotland. To help it achieve these aims, some significant barriers must be addressed. These barriers inhibit the industry's growth, discourage demand and hold back job creation just at a time when jobs are most needed.

BHA Scotland will work:

1. To make the rate of VAT in Scotland on accommodation and attractions competitive with the rate of other EU member states.

Scotland cannot realistically compete with European competitor countries when there is such a disparity in the respective VAT rates for hotel accommodation and attractions (and for meals eaten out-of-home).

2. To eliminate the difficulties faced by potential visitors in obtaining visas to visit the UK as part of their European travel arrangements.

Visa control procedures, while remaining important, should be applied with more understanding of the needs of applicants so that they are easier to obtain and complete. Many applications are not in the appropriate language, all need biometric information, and require a personal visit to a UK consulate. In addition, visa costs act as a deterrent.

3. To control the high – and rising – rate of Air Passenger Duty.

This raises costs for visitors to and from Scotland and inhibits visitor numbers. A new route development fund in Scotland is required to facilitate a significant increase in visitor numbers via new direct air routes.

4. To ensure that funding for VisitScotland is maintained.

It should be regarded as a necessary investment, central to the success of Scottish tourism and the Scottish hospitality industry.

5. To encourage Scottish Enterprise and Highlands and Islands Enterprise to recognise the relevance of the hospitality industry to local economies so that they continue to support the sector through funding and assistance.

The industry is able to create jobs – at all skill levels – as effectively as other sectors of the economy. Both agencies should also recognise that the on-going promotion of tourism areas is as important to their growth as attracting capital investment and do all that they can to support that growth.

6. To minimise the regulatory burdens on the industry.

At present implementing the rising tide of rules and regulations costs management time and money. This burden needs to be eased and we welcome the UK government's one-in and one-out policy on new regulations. However, that still leaves too many regulations that businesses need to comply with. The industry looks forward to the results of the Tourism Regulation Task Force, set up under the chairmanship of Alan Parker, president of the BHA, which is examining this problem.

7. To ensure that all Scottish local authorities recognise their responsibility to promote economic growth within their area and regard the hospitality industry as a key driver of that growth.

They must introduce policies that create an environment in which hospitality businesses can grow and develop as an integral part of the local plan. They must also continue their current investment in the industry by funding Tourist Information Centres and tourism officers and work closely together with local and regional tourism marketing associations.

8. To stimulate even more investment in the hospitality industry.

This should be through a change in legislation, making it easier for hotels to operate within the framework of Real Estate Investment Trusts, but investment will also be encouraged through other capital allowances and incentives that encourage new construction, extensions and additions.

9. To ensure that the Scottish Government understands the critical need for, and supports and facilitates investment in, the development of high speed broadband, rural broadband, rural mobile signal and 3G/4G.

10. To ensure that the Scottish Government recognises how tourism fits into wider economic growth in such sectors as the energy, food and banking markets.

There are clearly opportunities for greater co-operation and understanding to ensure that the hospitality sector can gain from sectoral initiatives.

The value of hospitality to local authorities

The following table gives details of the number of people directly and indirectly employed by the hospitality industry in each local authority area in Scotland, together with the GVA of the industry. The final column forecasts the number in direct employment in 2020.

Table 7: Hospitality employment and GVA in local authorities

SCOTLAND	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
Scotland	Aberdeen City	16,703	9.2%	24,874	13.7%	310	4.5%	643	9.4%	19,715
Scotland	Aberdeenshire	7,223	6.9%	11,049	10.5%	144	3.8%	308	8.0%	8,615
Scotland	Angus	3,227	7.5%	4,899	11.4%	53	4.1%	113	8.6%	3,861
Scotland	Argyll & Bute	4,980	10.8%	7,743	16.7%	100	7.7%	217	16.7%	5,978
Scotland	Clackmannanshire	953	5.9%	1,498	9.3%	17	2.9%	37	6.3%	1,131
Scotland	Dumfries & Galloway	5,638	8.5%	8,474	12.7%	106	5.7%	222	12.0%	6,788
Scotland	Dundee City	6,328	8.1%	9,239	11.8%	112	4.1%	227	8.3%	7,528
Scotland	East Ayrshire	2,653	5.9%	4,183	9.3%	37	3.0%	81	6.6%	3,169
Scotland	East Dunbartonshire	2,136	8.2%	3,347	12.9%	40	3.7%	88	8.0%	2,582
Scotland	East Lothian	2,806	9.1%	4,362	14.2%	54	4.8%	116	10.5%	3,362
Scotland	East Renfrewshire	1,858	8.3%	2,755	12.3%	29	4.2%	61	8.8%	2,234
Scotland	Edinburgh, City of	32,387	10.0%	49,212	15.1%	663	4.7%	1,405	10.0%	38,794
Scotland	Eilean Siar	917	7.7%	1,428	11.9%	16	5.7%	34	12.3%	1,096
Scotland	Falkirk	4,609	7.5%	6,933	11.3%	83	3.1%	174	6.4%	5,518
Scotland	Fife	11,260	8.2%	17,863	12.9%	193	4.2%	428	9.2%	13,464
Scotland	Glasgow City	35,358	8.4%	53,704	12.8%	627	4.2%	1,328	8.8%	42,295
Scotland	Highland	13,923	12.1%	21,715	18.9%	242	8.8%	526	19.1%	16,657
Scotland	Inverclyde	2,125	7.3%	3,346	11.4%	29	3.1%	63	6.9%	2,533
Scotland	Midlothian	1,831	6.2%	2,808	9.4%	33	3.2%	72	6.8%	2,191
Scotland	Moray	3,053	7.2%	4,615	10.9%	47	5.1%	100	10.7%	3,656
Scotland	North Ayrshire	4,351	10.0%	6,617	15.3%	73	5.1%	155	10.9%	5,195
Scotland	North Lanarkshire	9,126	6.8%	14,453	10.7%	144	3.1%	317	6.9%	10,810
Scotland	Orkney Islands	1,037	7.7%	1,626	12.1%	17	5.4%	37	11.8%	1,244
Scotland	Perth & Kinross	8,125	10.8%	12,381	16.5%	155	6.6%	330	13.9%	9,718
Scotland	Renfrewshire	6,408	8.0%	9,934	12.3%	118	3.8%	255	8.2%	7,652
Scotland	Scottish Borders	4,116	8.3%	6,229	12.5%	66	5.0%	138	10.6%	4,877
Scotland	Shetland Islands	962	5.6%	1,558	9.0%	17	3.7%	39	8.4%	1,143
Scotland	South Ayrshire	5,879	11.4%	8,836	17.2%	121	7.5%	253	15.6%	7,059
Scotland	South Lanarkshire	9,271	7.2%	14,674	11.4%	149	3.3%	329	7.3%	11,082
Scotland	Stirling	4,973	9.9%	7,835	15.6%	87	5.5%	191	12.1%	5,965
Scotland	West Dunbartonshire	2,984	8.8%	4,622	13.6%	58	4.4%	125	9.5%	3,570
Scotland	West Lothian	4,881	5.9%	7,735	9.4%	86	2.9%	189	6.4%	5,811
TOTAL		**222,081**	**8.6%**	**340,547**	**13.1%**	**4,026**	**4.5%**	**8,601**	**9.5%**	**265,293**

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