

National Events Strategy Review: Partial Business and Regulatory Impact Assessment

March 2023

Partial – Business and Regulatory Impact Assessment

1. Title of Proposal

Scotland's National Event Strategy Review

2. Purpose and Intended Effect

2.1 Background

The scope of the national events strategy review is to undertake a comprehensive review and update of Scotland's events strategy to ensure it remains fit-for-purpose for an extended term from 2025 to 2035, enabling the continued successful development and delivery of world-class business, sporting and cultural events, and retaining Scotland's global sector status as a world-leading events destination. The Scottish events sector, Scottish Government and VisitScotland are working together with trade unions and local authorities on the review.

Scotland's national event strategy, Scotland the Perfect Stage¹, was first published in 2008 in response to Scotland's burgeoning potential to be a global leader in the events industry. It was reviewed and updated to cover the period 2015 to 2025. There was a renewed focus on five key impact areas including Economic, Brand Identity & Reputation, Media & Profile, Social & Cultural and Sustainability.

2.2 Objective

Although Scotland has had many successes under the current strategy, the event sector has recently endured a period of unprecedented disruption. This presents a number of challenges and potential opportunities for the sector in Scotland. A key objective of the updated strategy is to provide strategic focus for all involved in any aspect of planning, securing, supporting and delivering events of all sizes in Scotland through to the end of 2035. The review provides everyone with a role in Scotland's world-class event industry the chance to shape the sector's updated strategy.

The National Events Strategy has the potential to positively impact on all of the National Outcomes set out in the National Performance Framework². However there are particular opportunities around national outcomes focusing on: economy, fair work and business, international, communities, culture and environment.

The national events strategy review process will consider future strategic outcomes in areas such as:

¹ [Supporting Events in Scotland | VisitScotland.org](https://www.visitScotland.org)

² [National Performance Framework | National Performance Framework](https://www.nationalperformanceframework.gov.uk)

- Wellbeing Economy. Extending the social and cultural benefits of events. Tackling inequality and improving accessibility – both in terms of fair work practices, and audience and community experience. The impact of events on audiences in generating civic pride and community engagement. Enhancing Scotland’s place on the world stage by hosting major international events, while holding true to our ‘homegrown’ signature principles.
- Transition to Net Zero. The Scottish Government has set climate change ambitions to become a net zero greenhouse gas emitting nation by 2045³. It has also committed to doing this in a way that is just and fair for all people across Scotland. These are ambitious targets and require a collective effort from all corners of society to play their part in achievement. This includes governments, businesses, organisations, communities and households. There is an opportunity for the events sector to be at the forefront of developments in this area. Environmental sustainability could act as a lever to attract events to Scotland. Home-grown world class events taking the lead and setting a new standard for sustainability.
- Skilled workforce and Fair Work practices. Developing, and maintaining globally significant talent. Attracting talent to and developing skills within the event sector workforce. This includes good quality, fair and flexible jobs that align with the dimensions of Fair Work (effective voice, security, respect, opportunity and fulfilment). Building an attractive employment offer. Instilling confidence in the security of the industry as key elements in promoting the sector as a great place to work. Ensuring workers have an effective voice in influencing workplace practice and decisions.
- Measurability and sharing good practice. Building a strong narrative across the range of interests and outcomes. Better evidencing and demonstrating the benefits and impacts of events to Scotland and across key policy areas. Measuring not only economic aspects and tourism, but also community and cultural impacts, child poverty and net zero. This work will be critical to ensuring that we are able to measure and monitor relevant impacts accurately and consistently across the sector throughout the term.

2.3 Rationale for Government Intervention

Scotland’s event sector generated significant economic activity pre-pandemic. This included event-related visitor spend, including from tourism. In addition, the sector generated a wide range of vital social and cultural benefits. Based on the Annual Business Survey 2018, the events industry had an estimated turnover of £1,927 million in 2018 (0.8% of Scotland’s non-financial business economy turnover in 2018). The industry also generated an estimated Gross Value Added of £978 million in 2018 (1.0% of Scotland’s non-financial business economy Gross Value Added in 2018).

The current strategy looks to utilise and develop the assets that make Scotland a perfect stage for events with a focus. These are: our People, our Cultural Identity

³ [Climate change - gov.scot \(www.gov.scot\)](https://www.gov.scot)

and Heritage, our Natural Environment, our Built Facilities; and our Signature Events. Also, to develop and deliver a portfolio of events that provide world leading authentic experiences for Scotland's residents and visitors.

Under the current strategy Scotland has successfully developed a strong and dynamic events industry. This includes a world-class portfolio of business, sporting, and cultural events. These deliver against the key impact areas and generate valuable international profile for Scotland.

The term of the current strategy is nearing conclusion. Scottish Ministers' Programme for Government is committed to another review. This will update and strategy and extend its term to the end of 2035.

The impact of COVID-19, exit from the EU, and increasing climate change concerns have all significantly disrupted the event industry in recent years. This has fundamentally changed the environment in which the sector operates.

For example:

- COVID-19 – an international survey of the event sector from December 2021⁴ showed that:
 - 45% of companies had taken on debt;
 - the number of businesses that turned over less than £50,000 had grown by 56%;
 - 95% of manufacturers were experiencing component shortages; and
 - 70% of non-manufacturing companies were experiencing a delay in finished goods.

- Climate change – UK festivals generate 25,800 tonnes of waste, 22,876 tonnes of CO₂ and use 185 million litres of water annually⁵. Festival-goers produce 2kg of waste per person per day. This is nearly twice as much as is produced per person per day from household waste⁶. There is an industry-wide pledge to halve the negative environmental impacts of festivals by 2025. In addition, the industry aims to achieve a 23% reduction in relative emissions per audience day from energy, waste, and water. This is mainly driven by diverting waste from landfill. Despite these goals total music festival carbon emissions from energy, waste, and water on-site have risen over the past five years. This has been driven by a nearly 50% increase in audience numbers⁷.

The updated strategy will provide strategic focus for all involved in the planning, securing and delivery of events of all sizes in Scotland. It will bring together all parts of the public, private and third sector that play a role in Scotland's world-class event

⁴ PLASA & #WeMakeEvents survey report – PLASA

⁵ Association of Independent Festivals ([FES0034](#)) para 9.1

⁶ Vision:2025, 2020 Update THE SHOW MUST GO ON, p 42

⁷ Vision:2025, 2020 Update THE SHOW MUST GO ON , p6

industry. It will also drive progress and safeguarding Scotland's global status as the perfect stage for events.

3. Consultation

3.1 Within Government

A Project Team has been established to manage all activity across the lifecycle of the strategy review.

The Project Team is co-chaired by VisitScotland (Events Directorate) and Scottish Government (Cultural Futures and Major Events Division) representatives. It includes team members with defined responsibilities to deliver the project within the scope and in adherence with the agreed timeframe and budget.

Policy, Analysis and other Divisions/bodies across the Scottish Government are being engaged in the strategy review. These include Directorates for:

- Culture and Major Events;
- Economic Development;
- External Affairs;
- International Trade and Investment;
- Economic Strategy;
- Local Government and Housing;
- Energy and Climate Change;
- Agriculture and Rural Economy; and
- Equality, Inclusion and Human Rights.

The Scottish Government's Analysis Division and Civil Law and Legal System Division are also providing specific advice to underpin the development of this Business Regulation Impact Assessment. Transport Scotland are also engaged.

Local Authorities are being engaged in the strategy review via the Convention of Scottish Local Authorities and the Trade Unions via the Scottish Trades Union Congress.

3.2 Themed Groups

Short life Themed Groups have been established to draw on industry expertise in the collation of relevant data, research and analysis. These help ensure a strategy for and by the sector. Details are set out below:

3.2.1 Group 1: Economic benefit and financial sustainability

Considering aspects such as: the economic impact of events; financial sustainability; types of events; enhancing Scotland's place on the world stage by hosting major international events; spreading the economic benefits of events across Scotland and measurability and sharing good practice for this theme.

Membership: Scottish Government, VisitScotland, sportscotland, 21CC group, The Royal Highland and Agricultural Society of Scotland, the R&A, DF Concerts, Dandelion, Scottish Event Campus Ltd, Scottish Enterprise, Aberdeen City Council.

Date of meeting: 7 December 2022

3.2.2 Group 2: Skilled workforce and Fair Work practices

Considering aspects such as: improving accessibility in terms of fair work practices; developing, and maintaining globally significant talent; attracting talent to and developing skills within the event sector workforce; building an attractive employment offer; instilling confidence in the security of the industry as key elements in promoting the sector as a great place to work; helping ensure workers have an effective voice in influencing workplace practice and decisions; and measurability and sharing good practice for this theme.

Membership: Scottish Government, VisitScotland, sportscotland, Creative Scotland, BECTU (Union for Creative Workers), Scottish Live Events Network, Edinburgh Napier University, The National Outdoor Events Association, Capital Theatres, Skills Development Scotland, Scottish Event Campus, Experience Scotland, Renfrewshire Council, West Lothian Council.

Date of meeting: 8 December 2022

3.2.3 Group 3: Net zero and environmental sustainability

Considering aspects such as: environmental sustainability as a lever to attract events to Scotland; home-grown world class events taking the lead and setting a new standard for sustainability; measurability and sharing good practice for this theme.

Membership: Scottish Government, VisitScotland, Creative Scotland, sportscotland, Zero Waste Scotland, Cycling World Championships Ltd, DF Concerts, Foundation for Sustainable Golf, Festivals Edinburgh, Edinburgh International Conference Centre, Glasgow Life, Cryptic.

Date of meeting: 7 December 2022

3.2.4 Group 4: Wellbeing and audience/community experience

Considering aspects such as: extending the social and cultural benefits of events; tackling inequality and improving accessibility in terms of audience and community experience; spreading the wellbeing benefits of events across Scotland, through a portfolio of different sizes and types of events; and measurability and sharing good practice for this theme.

Membership: Scottish Government, VisitScotland, Creative Scotland, sportscotland, Dundee City Council, Cycling World Championships Ltd, Glasgow Life, Royal Scottish Highland Games Association, Edinburgh International Festival, The Enchanted Forest, Scottish Society of Playwrights, DF Concerts, Writers Guild, Dumfries & Galloway Council, The Royal National Mod, HebCelt Festival, Findhorn Bay Arts.

Date of meeting: 8 December 2022

3.2.5 Headline discussion points emerging from Themed Groups

All Themed Groups considered what success looks like and broadly, for them, this meant an event sector that:

- is financially robust and sustainable;
- delivers significant economic benefit for Scotland;
- is an attractive sector for employment that fairly rewards its workforce in payment, conditions, security and opportunity;
- is environmentally responsible and delivering the sectors just transition to net zero;
- showcases Scotland and our values and assets globally; and
- is contributing positively to the physical, mental and social health and wellbeing of individuals and communities.

Shared areas of focus include:

- excellent event experience;
- best practice, innovation and continuous improvement;
- promotion and profile; and
- an approach of partnership and collaboration.

More information on the discussion points emerging from the Themed Groups are set out in the National Events Strategy review consultation paper. This is being published alongside this partial Business Regulatory Impact Assessment as part of the public consultation exercise.

3.3 Public Consultation

We expect a public consultation in support of the National Events Strategy to be launched on 24 March. This will run for 14 weeks. Further information on the public consultation will be available at the Scottish Government's Citizen's Space⁸ website. VisitScotland and the Scottish Government will also undertake a series of workshops across Scotland. These will under-pin the public consultation exercise and the wider national events strategy review. More information on how to take part in the workshops will be provided by VisitScotland shortly.

3.4 Business

Engagement with business is central to the review of the national events strategy. A number of event businesses have already been engaged in national event strategy review via Themed Groups. Further information on the Themed Groups and their membership is set out under the consultation within government section of this Business Regulatory Impact Assessment.

Businesses from the event sector will also be central to the planned public consultation exercise and engagement workshops in support of the national events strategy review. The views of businesses participating in the public consultation and

⁸ [Scottish Government - Citizen Space \(consult.gov.scot\)](https://consult.gov.scot)

workshops will inform the Scottish Firms Impact Test section of the final version of this Business Regulatory Impact Assessment . We expect to publish this later in the year alongside the National Events Strategy 2025-2035.

Meantime views have been gathered from businesses taking part in the Themed Groups and other relevant consultation. This has informed the Scottish Firms Impact Test section of this partial Business Regulatory Impact Assessment.

4. Options

The National Events Strategy 2025-2035 is not a new strategy. It will build on two earlier editions of the Strategy. One of these was published in 2008 (to cover the period 2008-2015). The other was published in 2014 (to cover the period 2015-2025).

The refreshed National Events Strategy 2025-2035 is expected to generate a significant number of outputs over its 10 year life. These will deliver on its agreed strategic outcomes. Each strategic outcome will have benefits and costs. These will be considered by the lead organisation and other partners at the planning stage for any actions flowing from the strategy. This may result in the development of Bespoke Business and Regulatory Impact Assessments. This will take place after the Strategy is published and be a matter for decision by the lead partner. Meantime the option assessment which this Partial Business and Regulatory Impact Assessment focuses on is around the content and timescale of the strategy review.

The options considered for the content and timescales for the strategy review were:

Option 1 – proceed with the National Event Strategy Review from October 2022. This would include a public consultation process. The refreshed strategy would be published later in 2023.

Option 2 – proceed with the National Event Strategy Review from October 2022. The public consultation phase would not be included. The refreshed strategy would be published in the Summer of 2023.

Option 3 – proceed as per option 1 but to delay strategy review until late 2023. With this option the refreshed strategy would be published before the end of the current strategy in 2025.

Initial engagement with VisitScotland and the Event Industry Advisory Group⁹ indicated that a review of the strategy would be useful and should be taken forward.

Not proceeding with the strategy review at all was also considered as part of this initial engagement. It was decided that this was not a viable option. This was because the current strategy ends in 2025 and it was essential to review its contents before then given the economic and social importance of Scotland's events sector. A review was also considered important due to need for the sector to continuously

⁹ [Event Industry Advisory Group - Updates & Guidance | VisitScotland.org](https://www.visitScotland.org.uk/updates-and-guidance)

evolve. This helps ensure that the potential of new consumer trends is harnessed. It also helps maximise the contribution of events to the Scottish Government's wider ambitions.

The option to proceed without the public consultation element was also considered. Instead the focus would have been on engaging via regional engagement workshops. It was decided that this was also not a viable option. This was because it was unlikely this option would result in the refreshed strategy being published significantly earlier. In addition, there would still be a financial cost and resource required to run the engagement workshops. Crucially this option could provide less opportunity for participation than a full public consultation. For example, for communities and businesses in rural and island communities who may be unable to travel to regional workshops and may prefer to engage via the public consultation hosted on Citizen Space.

Option 1- as set out above- was however subsequently developed to include both the public consultation element and also a series of regional engagement workshops led by VisitScotland.

4.1 Sectors and groups affected

The national event strategy review- and the National Events Strategy 2025-2035 when published- has the potential to impact on people right across Scotland. This focuses on three broad groups:

1. Organisations and individuals working in and with the industry. This includes: Local Authorities and other public bodies; regulators; event owners and promoters; event supply chain; freelancers; third sector organisations and clients and influencers in the Business Events sphere. In addition, representatives from business, sport, arts and wider cultural events are also directly shaping the review. This is through the Event Industry Advisory Group, and their views will inform the final Business Regulatory Impact Assessment. Public consultation, supported by targeted workshops, will bring in a greater breadth of voices from across industry and academia to shape the strategy.
2. People attending events. Representatives from spectator and participant groups have been involved in shaping the initial position for consultation and the final strategy. This is part of a strong impact assessment process. Public consultation, supported by targeted workshops, will bring in a range of audiences to shape the strategy, as appropriate.
3. People in the communities where events are held. A similar approach to people attending events.

Option 2 set out below would particularly affect people attending events and people in communities where events are held as this option does not include a public consultation phase.

Option 1 and 3 below would not have any differential effect on any of the three broad groups set out above, as the difference between these options focuses on timing of the 2025-2035 strategy launch but would not necessarily affect its content.

How the above groups are affected by the content of the National Events Strategy 2025-2035 will depend on how and when the strategy is implemented by businesses and other stakeholders across the event sector in Scotland. This includes the Scottish Government, lead public bodies, event organisers and their supply chain, third sector organisations and also local communities. Implementation will be subject to monitoring and evaluation. The strategy will also be continuously developed over its lifetime to harness new and emerging opportunities.

Further analysis on any disproportionate impact the content of the National Events Strategy 2025-2035 might have on particular groups is set out in the impact assessments for the strategy review. These are: Equality Impact Assessment; Child Rights and Well-being Impact Assessment; Fairer Scotland Duty Assessment; and Island Communities Impact Assessment. We plan to publish these assessments later in 2023, alongside the full version of this Business Regulatory Impact Assessment and National Events Strategy 2025-2035.

A Strategic Environment Pre-screen was also undertaken for the strategy review. The relevant guiding principles were considered during preparation but they were not deemed relevant to the strategy review. This was due to the minor effects on the environment it is likely to have. This decision has been shared with the relevant consultation authorities.

4.2 Benefits

4.2.1 Option 1 Proceed with the National Event Strategy Review from October 2022. This would include a public consultation process. The refreshed strategy would be published later in 2023.

This option provides a credible set of proposals for consultation (which have been developed with input from stakeholders). It also provides the opportunity for individuals, communities and organisations across Scotland to inform the final strategy. In addition, it is a natural basis for engagement with Parliament as part of the process.

Consultation is a key tool to improve transparency, effectiveness and to raise awareness during development of the strategy. It also provides the opportunity to collect data/information for future analytical purposes. It can also help to identify (particularly though open text) unintended effects and practical problems, along with providing the opportunity to share feedback more generally.

This option also provides an appropriate period of time to develop implementation plans.

This option was also considered the most likely to result in a strategy that partners commit to implement together. This delivers on National Strategy for Economic

Transformation and other key priorities to the benefit of both the events industry and Scotland as a whole.

4.2.2 Option 2 – Proceed with the National Event Strategy Review from October 2022. The public consultation phase would not be included. The refreshed strategy would be published in the Summer of 2023.

Removing the public consultation would reduce the overall financial cost of the strategy review. Primarily these costs fall to the Scottish Government and VisitScotland.

This option also confirms the strategic direction for the sector sooner (compared to option 1) which could also be beneficial.

4.2.3 Option 3 – Proceed as per option 1 but to delay strategy review until late 2023. With this option the refreshed strategy would be published before the end of the current strategy in 2025.

This option would allow VisitScotland and Scottish Government staff resources to deliver on other current priorities. It would still allow for the refreshed strategy to be published before the end of the current strategy in 2025. Other benefits around consultation are as per option 1.

4.3 Costs

4.3.1 Option 1 – Proceed with the National Event Strategy Review from October 2022. This would include a public consultation process. The refreshed strategy would be published later in 2023.

Reduces available staff resources (primarily in VisitScotland and the Scottish Government) to deliver on other current priorities.

The public consultation process would increase the overall financial cost of the strategy review.

4.3.2 Option 2 – Proceed with the National Event Strategy Review from October 2022. The public consultation phase would not be included. The refreshed strategy would be published in the Summer of 2023.

This option would significantly change the basis of engagement with partners. It would remove or limit opportunities for individuals, communities or and organisations to influence the strategy. It may also limit the transformative potential of the strategy as it would be less likely to secure widespread buy-in if relying solely on targeted engagement.

Reduces available staff resources (primarily VisitScotland and the Scottish Government) to deliver on other current priorities but to a lesser extent than Option 1.

4.3.3 Option 3 – Proceed as per option 1 but to delay strategy review until late 2023. With this option the refreshed strategy would be published before the end of the current strategy in 2025.

A further period of uncertainty about strategic direction for the events sector. This review was originally intended to take place in 2019. It was postponed due to the pandemic so this further delay is not considered to be desirable.

A delay to aligning event sector activity to National Strategy for Economic Transformation priorities.

A delay in taking on board feedback on priorities from the event sector and other partners.

This option would also reduce the time available to develop implementation plans, reducing the likelihood of maximising benefits of strategy implementation.

4.4 Recommended approach

Option 1. The National Event Strategy Review should begin in October 2022 with the aim of publishing the refreshed strategy later in 2023.

4.5 Agreed Objectives of the National Event Strategy Review

A set of objectives have been agreed for the National Event Strategy Review. These are:

- An assessment of the extent to which the aims, objectives and measures included in the current strategy (2015-2025) remain valid.
- A strategy that is clear on purpose, providing strategic focus for all involved in the planning, securing delivery of events of all sizes in Scotland. Also, how relevant partners and stakeholders will support delivery of the strategy.
- A strategy that reflects the National Strategy for Economic Transformation and delivers on key Scottish Government policies and industry priorities and across a breadth of national outcomes. This incorporates ongoing work to align government activity around culture, sporting and business events with these priorities. For example, the ongoing development and evolution of the Business Events Policy-Driven Model.
- A strategy that is developed through engagement with relevant local, national and UK/international stakeholders across public, private and third sectors. This includes the event industry, Scottish Trades Union Congress, Convention of Scottish Local Authorities, public bodies, communities, audiences and international peers.

- A strategy that is underpinned by a robust evidence base. This includes clear objectives and measurables. Plans for monitoring and evaluation also need to be considered from the outset

Following the current strategy review our expectation is that the 2025-2015 National Event Strategy will be launched later in 2023 (see option 1 above).

4.6 Cost and benefits to the events sector and more broadly of any proposed legislation or regulation within the National Events Strategy 2025-2035

At this point we are unable to quantify the cost and benefits to the events sector and more broadly of any specific policy proposals, including legislation, regulation or voluntary measures, within the National Events Strategy 2025-2035. This is because no decisions have yet been taken on the detailed content of the new strategy. Further information will emerge later in 2023. At that point this Business Regulatory Impact Assessment will be updated accordingly- including monetary values related to the cost/benefit analysis, where possible. We expect that the final Business Regulatory Impact Assessment for the National Events Strategy 2025-2035 will be published alongside the new strategy later in 2023.

Any legislation or regulation that might feature in the published strategy would be expected to require a separate Business Regulatory Impact Assessment as part of further development. Any related voluntary or non-regulatory options would also be considered further in terms of undertaking a Business Regulatory Impact Assessment.

It is expected that there will be no compulsory elements of the National Events Strategy 2025-2035. Further work on implementation will take place after the strategy is published and is expected to include collaborative working across the events industry and other partners. Implementation

Following initial engagement with Themed Groups (mentioned under consultation section) There are some key themes around cost/benefit already emerging relevant to this partial Business Regulatory Impact Assessment. These are:

4.6.1 General

Some potential legal/regulatory aspects which could possibly need further consideration as part of the strategy review have already been highlighted through partner engagement. We expect that more detail of the potential changes, and so the costs and risks of each of these, will emerge as part of the strategy review process. Current thinking focuses on areas such as transport, regulation/licencing and broad event delivery aspects. Given the wide scope of the National Events Strategy any new or enhanced legislation or regulation flowing from the review process- and featuring as an action in the 2025-2015 National Events Strategy- would be expected to require its own specific Business Regulatory Impact Assessment to be developed at that time.

4.6.2 Strategy delivery- governance, monitoring and evaluation

The delivery of the National Events Strategy 2025-2035 is expected to require new governance arrangements to oversee its delivery and enhanced monitoring and evaluation systems to measure success. There are expected to be costs associated with these. For example, staff time across a range of lead partners to prepare for and attend governance meetings. In addition there might be costs related secretariat functions and broader analysis and reporting systems for businesses and other stakeholders. The headline expected benefit of enhanced governance arrangements is a strategy that fully delivers on its potential economically and more widely, with appropriate partner engagement. The availability of robust evidence to showcase success and areas for continuous development is also a key benefit.

4.6.3 Measuring success

In addition to gathering enhanced evidence nationally the new strategy could also highlight opportunities for businesses to collect more robust evidence at local level. For example, by sourcing enhanced data-sets to measure success and commissioning in-house and/or external evaluation activity. This could lead to increased costs gathering data. However benefits include being able to better showcase success for funders, to share lessons and learning and more broadly to develop each business and its portfolio of events in line with current trends and based on sound evidence.

4.6.4 Boosting accessibility

Boosting the accessibility of Scotland's events for disabled people is likely to be a central consideration for Equality Impact Assessment of the strategy review process.

There is a perception that enhancing accessibility can lead to significant costs for the sector due to the need to install aids and adaptations. These kind of investments may be appropriate and cost effective.

However, as well as the excellent facilities, the evidence we have also shows that substantive, well publicised, information on the customer journey and detailed site information is equally important for event attendees. For example, when planning a trip, 81% of disabled people will check a business' website before visiting. But 73% have found information on a venue's website to be misleading, confusing, or inaccurate¹⁰.

Feedback has been that providing robust information on the customer journey can come at little cost and delivers significant benefits for disabled people. VisitScotland highlights that 1 in 5 people in the UK is disabled and that their collective spending power is £249 billion¹¹. This data helps showcase the significant economic benefits for business of boosting accessibility alongside the key social benefits which are also well evidenced and already being harnessed by countries across the world.

¹⁰ [Accessible & inclusive tourism - Marketing toolkit | VisitScotland.org](#)

¹¹ [Accessible & inclusive tourism - Marketing toolkit | VisitScotland.org](#)

VisitScotland's accessible tourism drive already has significant momentum¹². VisitScotland's website showcases a number of good practice guides and advice sheets to help businesses harness the social and economic benefits of accessible events. This includes a specific guide for inclusive and accessible events which was jointly funded by the Scottish Government¹³. Further information for businesses is available at VisitScotland's website- via the inclusive tourism toolkit¹⁴.

4.6.5 Skilled workforce and Fair Work practices

This aspect contributes to the National Strategy for Economic Transformation¹⁵ ambition for a wellbeing economy that is fairer: ensuring that work pays for everyone through better wages and fair work, reducing poverty and improving life chances.

Perceived costs could include:

- financial and wider costs for the business related to- for example- payment of the real living wage;
- investment in workforce development;
- no inappropriate use of zero hour contracts; and
- action to tackle the gender pay gap and create a more diverse and inclusive workplace.

Benefits could include:

- improved organisational reputation and recruitment;
- reduced staff turnover;
- more diverse workplaces with a richness of talent; and
- a diversity of ideas and generally more engaged, committed and adaptable workers who spot challenges and opportunities, solve problems, offer insight and ideas for business improvement and create value.

4.6.6 Transition to net zero and environmental sustainability

This aspect contributes to the National Strategy for Economic Transformation ambition for a wellbeing economy that is Greener: demonstrating global leadership in delivering a just transition to a net zero, nature-positive economy, and rebuilding natural capital.

Related costs include a perception of increased financial costs for the businesses associated with a just transition towards net zero- for example:

- insulating buildings;
- buying local;
- switching to more energy efficient kit;
- enhanced recycling systems;

¹² [Accessible & inclusive tourism - Marketing toolkit | VisitScotland.org](#)

¹³ [Accessible & inclusive tourism - Marketing toolkit | VisitScotland.org](#)

¹⁴ [Accessible & inclusive tourism - Marketing toolkit | VisitScotland.org](#)

¹⁵ [Scotland's National Strategy for Economic Transformation - gov.scot \(www.gov.scot\)](#)

- time spent accessing the environmental impacts of suppliers;
- increased staff costs due to the need to establish;
- running carbon accounting processes; and
- reducing waste and single use plastics.

Benefits could include: taking action on climate change can help businesses grow, seize new opportunities, encourage investment and adapt against the challenges of a changing planet. Reducing emissions can lower businesses' running costs, save money and attract new audiences. These actions can ultimately help a business maintain a competitive advantage locally and also ensuring it is fit for the future.

There are existing regulations related to the above emerging themes that already affect organisations and individuals that may also be affected by the strategy review. For example around net zero/environmental sustainability. These regulations are led by other policy teams within Government. They and are often a consequence of other strategies and frameworks. Although these regulations impact on events of all types they have a much broader reach than the event sector and are not a direct consequence of the national events strategy review.

5. Regulatory and EU Alignment Impacts

The National Events Strategy 2025-2035 will not directly impact on any regulatory features related to leaving the EU. A separate Business Regulatory Impact Assessment will be undertaken for any specific policy as required – including legislation or regulation - which might flow from the strategy and this will provide the opportunity for further consideration of this aspect if necessary.

5.1 Intra-UK trade

The National Events Strategy 2025-2035 will not directly impact on intra-UK trade. A separate Business Regulatory Impact Assessment will be undertaken for any specific policy as required – including legislation or regulation - which might flow from the strategy and this will provide the opportunity for further consideration of this aspect if necessary.

5.2 International Trade

The National Events Strategy 2025-2035 will not directly impact on international trade and investment, although events have the potential to support international trade and investment. A separate Business Regulatory Impact Assessment will be undertaken for any specific legislation or regulation which might flow from the strategy and this will provide the opportunity for further consideration of this aspect if necessary.

5.3 EU alignment

The National Events Strategy 2025-2035 will not directly impact on the Scottish Government's policy to maintain alignment with the EU. A separate Business Regulatory Impact Assessment will be undertaken for any specific policy as required

– including legislation or regulation - which might flow from the strategy. This will provide the opportunity for further consideration of this aspect if necessary.

6. Scottish Firms Impact Test

A substantive analysis of the Scottish Firms Impact Test will be provided in the final Business Regulatory Impact Assessment which will be developed after the 14 week public consultation period for further consultation and then published alongside the National Events Strategy 2025-2035 later in 2023.

It is estimated, based on the Inter-Departmental Business Register 2021 and 2020 Business Register and Employment Survey, that there are 3,725 Events Industry businesses in Scotland. Our aim is that all businesses affected by the National Events Strategy 2025-2035 will have the opportunity to engage in the public consultation and as many businesses as possible will be able to engage in the engagement workshop led by VisitScotland. A communications plan for the consultation has been developed to support these objectives.

Meantime, to ensure a strategy for and by the sector, short life Themed Groups have been established to draw on industry expertise to inform the strategy review. To underpin the working groups and support measurability each group has a number of number of both unique and shared indicators.

The groups that have been identified are:

Group 1: Economic benefit and financial sustainability

Group 2: Skilled workforce and Fair Work practices

Group 3: Net zero and environmental sustainability

Group 4: Wellbeing and audience/community experience

Further information on these groups is provided at the consultation section of this Business Regulatory Impact Assessment.

Each of the Themed Groups was provided with a draft strategic proposition for their theme for consideration and also discussion paper in advance of their meetings. They were also provided with an information paper which set out the broader context and available data and evidence.

Headline feedback- particularly related to this Business Regulatory Impact Assessment- from the face-to-face discussions held with the Themed Groups set out above includes:

6.1 Financial and economic environment

- Cost of living crisis is impacting on staffing/workforce across all types of events, causing an increase in production costs, and affecting ticket sales income and the availability of suppliers. It could also harm a move toward more environmentally sustainable practices and solutions as these are often perceived as expensive.

- The more 'costly' employment practices in Scotland can compare unfavourably with the costs for hosting in some other countries – though this higher cost also comes with an existing infrastructure in place, people who are ready to work, a more skilled and diverse workforce, and the ability to get things done within required timeframes.
- The industry is still recovering from the significant impacts of COVID-19. Growth is therefore particularly important.
- The unprecedented challenges of the pandemic have also had an effect on the public sector and the funds available. There was a concern that this would mean the development and delivery of future events could no longer be supported, affecting delivery of the benefits that come from events. This could be especially detrimental where (non-revenue generating) 'wellbeing activities' are not economically viable so are not prioritised within current business models.
- The current financial and environmental context was also seen as having the potential to restrict Scotland's ability to maintain its current competitive advantage in events in a competitive global market, damaging Scotland's international reputation, especially when compared to other, emerging countries with greater resources which are seeking to attract events and the workforce to deliver them.
- BREXIT has also created challenges for the industry.

6.2 Excellent event experience

- There was a concern that potential for events cancellation was a threat to ticket buyer/attendee confidence – particularly in reference to lack of resource to meet commitments when ticket sales are softer than hoped for by the organiser. In general terms, the industry is not yet seeing audiences back to attending events at pre-Covid levels, although there are areas of very strong demand. While this might be due in part to a lack of confidence, the variability in attendance across different types of event suggested that it may in part be due to people having less disposable income. It was suggested that there is a new trend for tickets to be bought last minute which is problematic in terms of cash flow and planning.
- There are challenges in a lack of local specialised suppliers. Further, even when suitable local suppliers were available, existing procurement processes can make it difficult to make use of them if they are not part of the existing framework. This can be a barrier to maximising economic benefits for the region in which the event is taking place, and for reducing environmental impact.

6.3 Innovation and improvement

- Scotland's event workforce, including an excellent supply chain, is a key strength and area for development. There were a number of challenges attached to this. Events in Scotland are competing for staffing and resources, not only with other destinations – including other parts of the UK – but with other sectors too.
- Transient and temporary nature for some of the event sector workforce can be very challenging.

7. Competition Assessment

Having applied the Competitions and Markets Authority competition filter, our view is that the National Events Strategy 2025-2035 will not have any negative impact on competition. There is no evidence to suggest that the strategy will limit: the number or range of suppliers; the ability of suppliers to compete or reduce suppliers' incentives to compete vigorously; and the choices and information available to consumers. There should be no competitive advantage to any particular individual or group as a result of the National Events Strategy 2025-2035.

8. Consumer Assessment

The National Events Strategy 2025-2035 has significant potential to impact on the consumer which in this case would be the event attendees, event organisers and the wider event supply chain.

Impacts have the potential to be wide ranging- with the aim of positive change. These aspects will be explored further after the public consultation component of the National Event Strategy concludes. By this point further feedback will have been received. The key areas of focus are expected to be price, availability, geographical spread and quality of events and also the information available to support them. For example, around accessibility and transport.

Any legislation, regulation or other substantive actions that might feature in the published strategy will each need their own bespoke Business Regulatory Impact Assessment prior to their further development. This would include a consumer assessment if relevant.

9. Test Run of Business Forms

The National Events Strategy 2025-2035 will not directly generate the need for any new forms for completion by businesses. However, during its implementation phase, there may be a need for new forms for businesses. For example, related to any legislation or regulation flowing from the Strategy or for grant applications. This aspect will be explored further through bespoke Business Regulatory Impact Assessments for individual policies, if necessary.

10. Digital Impact Test

Digital technologies are a central component of the success of Scotland's event sector and played a particularly central role during the COVID-19 pandemic.

Continuing to harness the significant potential of digital technologies is likely to be a key element of the National Events Strategy 2025-2035- across all of the headline strategic outcomes. Specific opportunities will be explored further following the conclusion of the public consultation component alongside wider industry engagement.

Broadly, the National Events Strategy 2025-2035 aims to promote and embed the lessons learned on digital event activities, including during the pandemic. It will not prescribe any operational changes nor is it likely to result in any adverse impacts on offline businesses.

The events industry will be central to delivery of the National Events Strategy 2025-2035. Planning to harness the potential of advancing technology over its life will be a matter for the events industry and individual businesses. In partnership with the DigitalBoost team, VisitScotland has created digital skills webinars to support the tourism and events sectors¹⁶.

11. Legal Aid Impact Test

We do not expect that the National Events Strategy 2025-2035 will give rise to increased use of legal processes or create new rights or responsibilities. However- like all other aspects of this partial Business Regulatory Impact Assessment- the Legal Aid Impact Test will need be considered further throughout implementation. Where appropriate, this will be done via bespoke Business Regulatory Impact Assessments that might be developed for any new legislation or regulation flowing from the Strategy.

12. Enforcement, sanctions and monitoring

The National Events Strategy 2025-2035 is advisory and will not be enforced by Government or result in any sanctions.

The National Events Strategy 2025-2035 will be subject to monitoring and evaluation and also continuous development to harness new and emerging opportunities over the life-time of the strategy. It is anticipated that this will be led by Scotland's events sector and supported by the Scottish Government, EventScotland and other partners, where appropriate.

¹⁶ [Our Recorded Webinars & Online Training | VisitScotland.org](https://www.visitScotland.org)

The strategy review and update process is already considering measurability and sharing of good practice as a central theme. A key area of discussion is building a strong narrative across the range of interests and outcomes to better evidence and demonstrate the benefits and impacts of events to Scotland and across key policy areas. Learning how to better measure not only economic and tourism impacts, but also community, cultural impacts, child poverty and net zero aspects is also a central consideration.

This work will be critical to ensuring that the sector is able to measure and monitor relevant impacts accurately and consistently throughout the term of the strategy.

The four Themed Groups set out earlier in this Business Regulatory Impact Assessment have considered these issues further. They suggested that there were a number of areas where better measurement and tools could support continuous improvement. This in turn could help highlight where events deliver on wider outcomes for Scotland. Building on this the public consultation exercise will include two specific questions around measurement.

Pending the conclusions of the public consultation, we will engage further with partners, including the events industry. This engagement will explore options for the monitoring and evaluation of the National Events Strategy 2025-2035. A further update will be provided in the final Business Regulatory Impact Assessment for the national events strategy review. This will be published alongside the 2025-2035 Strategy later in 2023.

13. Implementation and delivery plan

As set out above the approach to the National Events Strategy Review that will be progressed is Option 1- the National Event Strategy Review should begin in October 2022 with the aim of publishing the refreshed strategy in 2023.

Building on responses to the public consultation exercise and engagement events during this period, the review of the National Events Strategy 2025-2035 will be progressed. Any developments will be included in a final Business Regulatory Impact Assessment which will be published alongside the 2025-2035 Strategy later in 2023. A framework for the Strategy's implementation would then be established in advance of the delivery phase, working collaboratively with the events industry and other partners.

14. Post-implementation review

The National Events Strategy 2025-2035 will be reviewed and continuously developed throughout its life. This will be led by Scotland's events sector and supported by the Scottish Government, EventScotland and other partners, where appropriate. It is expected that the future of the National Events Strategy over 2035-2045 will be reviewed in 2033/34.

15. Summary and recommendation

15.1 Option 1

15.1.1 Benefits- proceed with the National Event Strategy Review from October 2022. This would include a public consultation process. The refreshed strategy would be published later in 2023

Includes a period of working in collaboration with partners and public consultation in early 2023 before publishing the refreshed strategy later in 2023.

This provides a credible set of proposals for consultation, the opportunity for individuals, communities and businesses across Scotland to inform the final strategy, and for engagement with Parliament.

Provides an appropriate period of time to develop implementation plans.

This approach to engagement is considered the most likely to result in a strategy that partners implement together to deliver on National Strategy for Economic Transformation and other priorities to the benefit of both the events sector and Scotland as a whole.

15.1.2 Costs - proceed with the National Event Strategy Review from October 2022. This would include a public consultation process. The refreshed strategy would be published later in 2023

There are costs relating to project team staffing. This reduces available Scottish Government and VisitScotland staff resources to deliver on other priorities.

The public consultation process would increase the overall financial cost of the strategy review through publication and analysis costs.

No other significant additional economic, environmental, social, policy and administrative costs per annum on top of those already incurred by policy and delivery have been identified at this stage.

15.2 Option 2

15.2.1 Benefits- proceed with the National Event Strategy Review from October 2022. The public consultation phase would not be included. The refreshed strategy would be published in the Summer of 2023

This would allow earlier publication of the strategy which could be beneficial in setting a clear agreed approach for the events sector sooner than option 1, providing certainty to those with an interest in this area.

The removal of the public consultation component would reduce administrative costs for publication and analysis.

15.2.2 Costs- proceed with the National Event Strategy Review from October 2022. The public consultation phase would not be included. The refreshed strategy would be published in the Summer of 2023

This option would significantly change the basis of engagement with partners by removing or limiting the opportunities for individuals, communities and organisations to influence the national strategy.

It may also limit the transformative potential of the strategy; as it would be less likely to secure widespread buy-in if relying solely on targeted engagement.

There would still be costs for project team staff resources but this would be less than Option 1.

No other significant additional economic, environmental, social, policy and administrative costs per annum on top of those already incurred by policy and delivery have been identified at this stage.

15.3 Option 3

15.3.1 Benefits- proceed as per option 1 but to delay strategy review until late 2023. With this option the refreshed strategy would be published before the end of the current strategy in 2025

This is similar to option 1 but would defer preparing proposals for consultation until later in 2023 with a view to completion before the end of the current strategy in 2025.

This would mean that there would be additional staff resources in the Scottish Government and VisitScotland to deliver on other priorities, whilst still publishing the refreshed strategy before the end of the current strategy in 2025.

15.3.2 Costs- proceed as per option 1 but to delay strategy review until late 2023. With this option the refreshed strategy would be published before the end of the current strategy in 2025

Would further lead to a further period of uncertainty about strategic direction for the events sector.

This review was originally intended to take place in 2019 and was postponed due to the pandemic so this further delay is not considered to be desirable.

Would mean a delay to aligning event sector activity to National Strategy for Economic Transformation priorities and delay taking on board feedback on priorities from the event sector and other partners.

Would reduce the time available to develop implementation plans, reducing the likelihood of maximising benefits of strategy implementation.

No other significant additional economic, environmental, social, policy and administrative costs per annum on top of those already incurred by policy and delivery, have been identified at this stage.

15.4 Recommended approach

Option 1. The National Event Strategy Review should begin in October 2022 with the aim of publishing the refreshed strategy later in 2023. This approach offers best value overall in terms of the economic, environmental, social, policy and administrative aspects as set out above.

15.5 Next steps

Following engagement with the Themed Groups a consultation has been developed. The 14 week public consultation on the Strategy will begin at the end of March 2023. Based on the evidence emerging from consultation this partial Business Regulatory Impact Assessment will then be refined alongside development of the National Events Strategy. We expect that both Scotland's National Events Strategy 2025-2035 and the final version of this Business Regulatory Impact Assessment will be published later in 2023.

16. Declaration and publication

- Sign-off for Partial Business Regulatory Impact Assessments:

I have read the Business and Regulatory Impact Assessment and I am satisfied that, given the available evidence, it represents a reasonable view of the likely costs, benefits and impact of the leading options. I am satisfied that business impact has been assessed with the support of businesses in Scotland.

Signed: Neil Gray

Date: 15 March 2023

Minister's name: Neil Gray MSP

Minister's title: Minister for Culture, Europe and International Development and Minister with special responsibility for Refugees from Ukraine

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