

# Tourism Leadership Group Meeting

## NOTE OF MEETING

Thursday, 30<sup>th</sup> November 2017

*Scottish Enterprise Offices, Edinburgh*

### Present:

- Robert Allan, Apex Hotels (RA)
- Fiona Cook, Scottish Government (FC)
- Marc Crothall, STA (MC)
- Danny Cusick, Scottish Enterprise (DC)
- Susan Deighan, Glasgow Life (SD)
- Steven Dott, Highlands & Islands Enterprise
- Paul Easto, Wilderness Scotland (PE)
- Charlie Smith, VisitScotland (CS)
- Russell Imrie, Queensferry Hotels (RI)
- Stephen Leckie, Crieff Hydro (SL) - Chair
- Judy Rae, Glasgow Science Centre (JR)
- Calum Ross, British Hospitality Association (CR)
- Bettina Sizeland, Scottish Government (BS)

### In Attendance

- Caroline Warburton, STA (CW)
- Rob McKinnon, Outer Hebrides Tourism
- Alison Macrae, Glasgow Chamber of Commerce
- Freda Newton, Jacobite Cruises
- Paul McCafferty, Scottish Enterprise
- Dr Grant Allan, Fraser of Allander, Univ of Strathclyde

### Apologies

- Gordon Dewar, Edinburgh Airport (GD)
- Stephen Duncan, Historic Environment Scotland (SD)
- Marina Huggett, Tourism Excellency Consultancy(MH)
- Anna Miller, Highlands & Islands Enterprise
- David Allfrey, Royal Edin Military Tattoo (DA)
- James Stuart, Entrepreneurial Scotland (JS)
- Suzanne Cumisky, SLAED Tourism Group

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## 1. Welcome & Note of Previous Meeting

SL welcomed all to the meeting, in particular Dr Grant Allan from Fraser of Allander and invited industry representatives. He also thanked Danny Cusick of SE for the meeting room and noted apologies.

The note of the previous meeting (Paper 1) was approved noting that the 2016 UK spend figures were released on visitScotland.org in October, and headline figures on VS's association with Tripadvisor have been provided.

## 2. TS2020 Update on Progress

An update was circulated prior to the meeting (Paper 2), together with the CEO Quarterly Report.

The drop in 2016 UK spend figures was once again highlighted as it does not appear to reflect sector feedback. Further analysis of the significant drop in spend by business travellers is required and CS to speak to VS Insights team to see whether any information is available on business traveller volumes (train and/or flights) between London and Scotland.

It was also agreed that there needed to be further interrogation of the methodologies of the key indicators to ensure that they are robust enough to be a strategic measure. CS informed the group that VS Insights are currently doing an audit of the main tourism datasets and it was agreed that a session would be held outwith the TLG meetings which focussed on tourism data. This session aims to understand what we have available, whether it is robust and if there are additional datasets or measures which could be used to better measure tourism success.

The VisitScotland Barometer was also mentioned which is being rolled out in seven local authority regions.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		CS to ask VS Insights Team for available insights drop in business travel, such as any analysis of trips between London & Scotland (flights or train passengers).	CS / VS
		CS to provide update on review of available tourism data underway by VS Insights.	CW
		Session to discuss sources of tourism data to be held prior to next meeting. Date/location tbc.	CW
		TLG members wishing to participate to notify CW by 8 <sup>th</sup> Dec.	ALL

### 3. Influencing Investment: Dr Grant Allan, Fraser of Allander Institute

Dr Allan provided an overview of Scotland's economic performance, using some of the key indicators such as productivity, un/employment, ageing workforce and consumer confidence to illustrate Scotland's position. He also positioned tourism within the economy, highlighting some of the challenges in definition, accurate data and identifying investment priorities.

Discussion centred around two broad themes:

- Labour & workforce factors: the effect that reducing labour turnover would have on business performance/productivity; the implications of adopting a more flexible approach to work patterns; and changes in workforce availability (such as Brexit, ageing workforce).
- Influencing productivity: how does productivity in Scottish tourism compare to other destinations and what can we learn from them?

The presentation is provided with the note of the meeting.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		Provide link to 'Productivity & Tourism' report by Scottish Enterprise (Nov 15) <a href="http://www.evaluationsonline.org.uk/evaluations/Search.do?ui=basic&amp;action=show&amp;id=589">http://www.evaluationsonline.org.uk/evaluations/Search.do?ui=basic&amp;action=show&amp;id=589</a>	CW

### 4. Influencing Investment: Bettina Sizeland & Fiona Cook, Scottish Government

BS and FC provided an overview of the Scottish Government's priorities (health, education and the economy), budget (£38bn, where this comes from, timescales for budgeting and allocations), current funding pots for tourism-related infrastructure (such as Industry Sector Deal, City Deals, ERDF, SME Holding Fund etc), the Tourism High-Level Working Group and what SG see as being required to ensure that there is a more collaborative approach with Government. There is a need to move from making the economic case for tourism (which has now been made) to making a better business case for investment.

A number of questions were posed (provided in the presentation accompanying this note) and there was agreement on the need to identify 2-3 priorities that will accelerate growth. Work has already begun on identifying priorities through the High Level Tourism Working Group so it was agreed that this initial list would be shared with the group. In addition the following themes were raised:

- **Skills & Workforce:** the importance of ensuring that the sector is able to service people coming to visit Scotland. Need to change perceptions of tourism to being a career of choice through a multi-faceted long-term campaign.
- **Marketing:** the importance of increasing the marketing budget for Scotland for the long-term. [Marketing spend in Scotland significantly lower than other competitor destinations].

- **Regional Support & Development:** aiming high to support on-the-ground activities through investment in the product development, facilities and destinations. City/Region Deals go some way to supporting this, however they are not joined up. BS/FC looking across the Deals to identify tourism activities.

The presentation is provided with the note of the meeting.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		Draft list of tourism investment priorities which have been submitted to Tourism Working Group to be circulate to TLG for comment.	FC
		Analysis of tourism projects included in City Deals to be provided.	FC
		Paper proposing 2-3 investment areas which will transform tourism.	TLG

## 5. Tourism Scotland 2030 – The Next Steps

CW and PMc outlined Paper 3 which provided context and questions in relation to the development of the next tourism strategy. Due to limited time, discussion was curtailed however there was unanimous agreement that work on the strategy should begin.

A number of individuals felt strongly that the industry-led approach was the right one in order to ensure engagement, however all acknowledged that it was equally important that the process and strategy also had a collective sense of ownership by the public and private sectors. All were asked to provide responses to the questions posed in Paper 3 and it was agreed that work would begin on developing the strategy refresh process for presentation to the group at the next meeting. MC was nominated as the chair of a sub-group to move this forwards.

Questions Asked of Group	Approved?	Comments / Actions	Who?
Commit to decision to lead preparation of new national tourism strategy	Y	Sub-group to be established, chaired by MC.	CW/MC
		Nominations for sub-group sought from TLG members and beyond.	ALL
		Development plan for next strategy including timeline and resources to be developed.	Sub-group
Agree indicative key principles to underpin the approach to preparing a new strategy	-	All TLG members to provide responses to themes posed in discussion paper to CW (by 8 Dec).	ALL
Agree outlined timeline for the completion of the new strategy.	Y	Announce commencement of strategy development process in March 2018.	-

## 6. AOB

There was no AOB.

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## Dates of Next Meeting

The 2018 meeting dates have been proposed, however all are on Wednesdays which is not convenient for all, so CW may look to change dates. TLG advised to keep dates available unless told otherwise.

17 January, 10.30am – 1pm, Edinburgh (NB: VS Parliamentary Reception in evening)

25 April, 2pm – 4.30pm, Edinburgh

19 September: 2pm – 4.30pm, *Stirling*

28 November: 11am – 1.30pm, Edinburgh