

Scottish Tourism Alliance
STA Council Meeting Minutes
3 September 2013
Apex House, 99 Haymarket Terrace, Edinburgh

Council Members Present:

Mairi Bell (MB), Henk Berits (HB), Claire Bruce (CB), Denise Connelly (DC), Terry Goddard (TG), Robert Kidd (RK), Stephen Leckie (SL), Keith Legge (KL), Angus MacDonald (AMacD), Willie Macleod (WM), Marion Oates (MO), Alasdair Smart (AS), Mike Story (MS), James Stuart (JS), Katharine Taylor (KT), Jeanette Wilson (JW), Robin Worsnop (RW).

Apologies

Linda Battison (LB), Fiona Bewers (FB), Lee Cousins (LC), Ian Fordham (IF), Sue Gruellich (SG), Judy Rae (JR), Alan Rankin (AR), David Smythe (DS), Stewart Walker (SW), Caroline Warburton (CW).

In attendance

Marc Crothall (MC), Elaine Townsend, Julie Wilson (JW) (Scottish Enterprise). Part of the meeting - Ewan Mearns (EM) (Scottish Enterprise), Graeme Rennison (GR) (Scottish Enterprise).

Welcome and Apologies

Stephen Leckie welcomed everyone to the meeting. Apologies were noted.

An update of the action points from the last minutes had been overlooked; an update will be sent out with the minutes. Going forward an update will be sent out with the papers ahead of the meeting.

Those present were asked to introduce themselves and give a brief overview of why they felt they were at the meeting.

Roles of Council and STA Leadership Group

MC stated this is the 3rd Council meeting and it is important that all understood the role of the council and where it fits into the broader STA structure and the role the council has to play in helping define future strategic actions and influencing of policy. MC displayed a slide outlining the core structure of the STA, which clearly showed the group inter relate eg be the sounding board for the Leadership Group and Executive Board. The council members are recognised as being a group of well respected industry representatives that can influence and challenge policies as we move forward. As we advance and identify specific sub-groups, the cross-section of the various knowledge/skills will be invaluable. MC stated it was also important that through the Council members own voice that they network and their own member base and cascade information out that is circulated, which will hopefully stimulate a 2-way communication.

Government acknowledges the credence of the STA Council and has already consulted with MC as to who on the Council would be valued representatives at specialist meetings. Agreement was sought that the defined role of the Council as presented was acceptable. It was acknowledged by MC/SL that there may be those who are representing an association/group who still have to go away and have a more formal discussion prior to being able to formally agree. The following bullet points define the role of the Council as circulated in the paper:

Role of the STA Council

- To act as a respected and informed sounding-board for the STA Leadership Group in terms of direction of travel re:TS2020 development of future actions and delivery.
- To stimulate action & TS2020 /STA engagement – within their own member/organisation base.
- To influence thinking and monitor future strategy and actions as it evolves.
- To provide visible and meaningful representation of wider industry interests.
- To consider the effectiveness of Government, public agency and local authority policy as it influences / supports delivery of the strategy and challenge, from an authoritative perspective, Government agencies where it does not.
- To provide a platform for high level interface with Government as and when appropriate and requested .
- To enable the STA central office to have means of enhanced two-way communications with industry.
- To allow scope to create sub-groups to deal with particular industry related issues.
- To support STA response to consultation on Government / Public agency engagement and policy.

Session 1. TS2020 Sustainability work stream session facilitated by EM & JF of Scottish Enterprise

Presentation by Ewan Mearns, Scottish Enterprise.

EM set the scene - What are we looking for from this discussion? The paper circulated outlines what is happening around Scotland and it is how we turn strategy into action; there is a concern we are lacking clear messages. It is important we are clear what the expectations are. It is also important we discuss how best can we deliver and what does Sustainable Tourism mean. There are 3 levels:

- Scotland's strategic positioning
- Tourism products and services
- Business capabilities

We are all aware of the growth opportunities but what does sustainable tourism mean at the other 2 levels. There is a lot to build on. Low carbon is about growth for Scotland; it is important to put Scotland in a position to be ahead of the market and its competitors. We can discuss how we can better integrate low carbon ambitions for Scotland.

EM then gave an overview of the slides as per the following notes:-

Sustainable Tourism - An underpinning capability

- We need to be clear how the Sustainable Tourism capability will be addressed and delivered within TS2020
- Sustainability offers opportunities at three levels - it's about growing market opportunities as well as business efficiency
 - Scotland's strategic positioning
 - Tourism products and services
 - Business capabilities
- We are not starting from a 'blank sheet' - there are many leading companies and activities already in this space. Let's use them!

Sustainable Tourism - An underpinning capability

The story so far.....

- Sustainability is increasingly a core expectation of visitors across the customer journey

- There's strong alignment with Scotland's tourism offer (eg landscape, heritage, wildlife, outdoors etc)
- Sustainability is a mainstream business issue - and quickly moving from 'efficiency' to 'market opportunity'
- The public sector is obliged by statute to ensure its actions promote sustainability
- and there are already many great examples of sustainable tourism in action across Scotland.....

Sustainable Tourism - How to deliver and communicate

- Integration is **key** - ie enhancing the sustainability of the *whole* Action Plan

1. Food & Drink and Destinations Demonstrator Programmes

- Support the 'Premium, Provenance and Health' objectives of SF&D. Eg scale up Experiencing Scotland; link to regional F&D Clubs
- Businesses: Local food often carries a premium/higher return
- Produces: eg local F&D tours, festivals, themed events

2. Adventure Tourism International Marketing Booster

- Clear alignment in objectives ... but is whole of the customer journey aligned with sustainability objectives (eg transport, accommodation)?
- Can international marketing also enhance Scotland's global reputation as a 'clean, green' destination overall?

Sustainable Tourism - Discussion

1. Does the approach of embedding 'sustainable tourism' within other priorities and actions offer the best way to generate win-win benefits?

2. What needs to happen to communicate and deliver on this?

- What message(s) does the STA and/or Leadership Group need to give?
- Role of Council members in cascading key messages?
- How to engage the existing 'converts' to identify appropriate actions?
- What support is needed from public sector partners?

3. What barriers and enablers can we foresee - and how can the process of addressing this capability tackle these?

A facilitated discussion followed with the following points noted:

Q- Facilitators - In principal do you agree we should be looking at sustainability and green issues as part and parcel of the national strategy, as opposed to a separate entity as we have done in the past?

A- Council Responses:

- We would be sending out the wrong message if we weren't to embed it.
- There is a risk if it is a separate entity of people leaving it to others rather than address it on a wider front.
- It is what our customers are expecting.
- It is also about the language and definition.
- Concerns over the point of sustainability and its definition, that is being used as a 'buzz' word to cover a multiple of sins. We have to be careful we understand what sustainability actually means and not just talk about environmental and green issues, as there is a social and financial element, which means the 3 overlap. If we break it down into defined objectives rather than a

strategic objective - what does that really mean? Important it is broken down in a practical way.

- There is an overlapping use of the term 'green tourism' and 'sustainable tourism'; sustainable business practice does not equal green tourism and green tourism does not necessarily mean a sustainable business. We need to be very careful how we define it and how we go about it.
- We are talking about sustainable business practice and green tourism products. This comment was challenged - definition of green is the most sustainable way to run a business. We are talking about protecting the environment, which is the asset, which is the tourism product. Green tourism takes in social also. Economically it won't exist years down the line if you destroy the environment in which you are operating.
- We should see this as a multitude of opportunities as opposed to the term 'multitude of sins'.
- It is important to embed it in every aspect.

Q - Facilitators - In terms of definitions what do you think we should be talking about?

A - Council Response:

- The 3 circles is how we should be talking about it; the UN has a useful definition. We could define it in two ways - economic and social. We are also in danger of just talking green eco-tourism when it has to make financial sense, social sense and cover the three circles; in summary you start with green and the other two fall in line.

Facilitator - Everyone would appear to agree embedding it is the way forward. We now have to look at how we communicate it.

Council Response:

- What as a Council do we believe sustainability to be and what is our overarching position about it. Before we go out and do any of the work we have to be absolutely clear what we are communicating about. We should take the opportunity to define it ourselves and by doing that it is fit for purpose from the beginning. We can then put in place a series of actions that will bring it to life and send out a clear message statement that this is important.

Facilitator - in order to make that happen what do the council see as needing to happen? Should a sub-group be set up to decide on the clear messages and move things on from there?

Facilitator - if everyone agrees that a sub-group is the way forward we can work from there.

Council Response:

- It also means we take ownership.

Facilitator - Is this something we can action?

Council Response:

- If we take international travel as an example - we generate a lot of international travel, which in turn generates lots of air miles. The whole travel issue has to be addressed; not just inbound but how people get around Scotland as a whole.

Facilitator - this has been debated within SE, and it could come down to influence - what can we reasonably influence? We can influence how people come to Scotland and to a small degree we can

influence how people travel around Scotland.

Council Responses:

- We can play a key role how we encourage people to travel; eg. Sweden has a carbon calculator.

Chair - Are we challenging the definition?

Answer - No, we are shaping it as a group to enable us to take ownership of it and understand it.

- It is either sustainable or unsustainable; sustainable you go forward and carry on - unsustainable you go under.
- We should remember sustainable tourism is green tourism.
- We are an expensive nation to get to. We have to be careful it doesn't backfire. It's about getting the balance.
- We have to be careful if we are setting out to promise things, we ensure we can deliver them. Eg. do we have the transport choices to allow people to come to / travel within Scotland by reducing their carbon footprint?
- We should have some regard for how our market is behaving before we offer them something we can't deliver. Infrastructure has a long way to go before we are wholly sustainable. It is not only our responsibility to deliver this, government also has a responsibility to assist.

Facilitator We shape the definition and take the opportunities to ensure we 'unpack' buzz words etc and translate it into something that everyone understands. We also lay out a direction of travel along the lines of - we work towards achieving and that becomes our commitment to a series of actions.

Council Response:

- We are all on a journey; we should help each other rather than be critical.
- We should also think about "Responsible" tourism, which addresses some of the issues raised. Operators should look to operate responsibly within their environment.

ACTION - Form a sub-group. The following volunteered:-

James Stuart, Keith Legge, Jeanette Wilson, Robin Worsnop, Kathryn Taylor, Mike Story, Ewan Mearns, Marc Crothall. Denise Connelly (ZWS),

It has also been recommended that the following are invited to participate on the group given their active role with the ZW work stream:

Ryan James (Glasgow Restaurateurs Assoc), Reynaldo Guino-o (EICC), Janie Neumann (VisitScotland), Dan McIntyre (Glasgow City Marketing Bureau).

Council Responses:

- We want to bring overseas visitors to Scotland, we want to be sustainable but it is something we can't be sustainable on. There is a risk of trying to be sustainable and then it backfiring because it is not as simple as that.
- One of the roles of the council is to influence the decision making of government and local authorities. One of the issues on the delivery of this falls into 3 headings - collaboration,

engagement and infrastructure. A lot of this we have no control over but if we could bury some the hatchets in this country, for the size of population we have we don't co-operate very well. To try and get a coherent voice to influence the decision makers is an extremely important role of the STA and we could bring together our various organisations to get the collaboration. Once we get started at ground level this will enable business collaboration also. We have to pull together.

Facilitator - there is also the National Strategy and within that there are 4 assets, and when thinking around those 4 every one of them has sustainability at the heart.

MC stated - Using Windfarms as an example, last year the STA held a wind-farm seminar in response to what was becoming the high profile issue it is today within the press world etc. The response from the industry (members and non-members), when affording the opportunity to all to become engaged and put their views to government officials and others, was extremely disappointing. The message is about getting that influence and voice. We need to up the anti, which will make our opportunity to challenge on the policy a lot stronger. The STA has been able to influence decisions in other areas since, eg opening up discussion at high level on destination / funding protocol being one example. Momentum is there it's how we gather in the information and feedback. It is therefore extremely important that messages are cascaded through the associations/groups, the language we use is also key ie how we articulate the question / ask in order to get the feedback . Eg "Responsible" tourism is a word that connects much easier with those on the ground and the smaller operator.

Facilitator - There is a growth and commercial element that comes into it.

Is the council happy for Ewan to be part of the sub-group? It may be useful to have him around the table - all agreed.

Council Responses:

- There would appear to be 2 stages to this. To ask the group to take on the whole project and take it back is undermining the starting point. Whilst it is useful in terms of work stream to go away, work it up and bring it back, at that point the whole community needs to be brought in again. In the case we have a bedrock, we have a core position how are we going to use that to make the most of it? Communicating the position statement once we are comfortable with it should be the first thing, the process that breaks down the jargon and brings more people on board. Also gets the level of confidence and can be used as a means to draw in other thoughts.
- We are now at the point where the strategy arm has been done, we now need to convert that into practical.
- The majority of people travel by car but we want to encourage people to use public transport. What would the actions be to encourage travel by public transport whilst recognising the majority travel by car? There are already principals that are being used within the destinations that could be applied and looked at and may form the basis of what can be done at a national level.

EM - Are there case studies that can be used?

Council Response:

- Sharing of best practice has already been done by associations/groups. We have to be careful we don't reinvent the wheel. We've had our thinking time, we need to get on and deliver.

Facilitator - Some sectors do that very well - cross-sectorally it could be shared.

EM - What needs to happen to communicate?

- Use examples of best practice.
- There is a lot of mention about tools that already exist - how well known are they? How do we pull these together and put them into a central point where everyone can access them to enable organisations to take advantage of the opportunities.

Council Responses:

- RW - ETAG has created an on-line sustainability tool, it is now a case of communicating it out to the industry. **ACTION:** Upload onto STA website.
- Perhaps as council members we could circulate emails around what we are doing on this.

Facilitator - are people happy to do that? It is examples we are looking for that have made a positive difference.

Chair

It comes down to 3 things:

- engagement
- understanding
- retention

How we get our members / industry to understand that we are doing a lot? SL suggested adding a section on the STA website for outputs where people can be directed to find out exactly what the STA / Leadership Group / Council etc are doing.

MC - There is a Leadership Group meeting next week, all of the public agencies have been invited to submit a summary paper, which will be made available on the website. Also the minutes from Council meetings etc will be uploaded to enable people to get access to the information and thus allowing them to see exactly what is happening.

Facilitator - to summarise:

- Set up a sub-group
- Agreement people can feed in examples of sustainable tourism that can be used.
- JF to look at work that has been done by Tourism Intelligence Scotland around sustainability and the work by ETAG. Put together as much information together as possible and feed back to the next meeting.

ACTION: The sub-group to come back to the next meeting with a paper in advance of what has been agreed.

Denise Connelly, Zero Waste Scotland

There was no time during the meeting to go through the slides; details and notes are show below:

Supporting Sustainable Tourism

Launch of Resource Efficient Scotland - launch by ZWS in April 2013. Government funded and incorporates elements of ZWS, Carbon Trust and Energy Savings Trust. Gives free advice, training and practical support on energy, water and materials use = cost saving. Contact Denise Connelly to discuss

in more detail.

HaFSA/TS2020 Sustainability Working Group - Hospitality and Food Service Agreement works across the UK to reduce food and packaging waste - the group has Scottish companies working to ID projects ZWS can support. Next meeting 8 October 2013 - can act as a delivery group for activity linked to the TS2020 strategy. DC will feedback outputs from their meetings to the sub-group.

Waste (Scotland) Regulations 2012 information programme - Regulations enforced from January 2014. Latest phase of communicating the impact to business is underway.

Link to GTBS - ZWS working with GTBS to align criteria with the HaFSA so that GTBS members can auto join HaFSA. Gives access to support and also means we can measure industry progress.

Litter Prevention - Intensive ZWS programme to tackle the problem of littering - includes promo of activity on recycling - support available.

QTA Training - VisitScotland advisors trained by ZWS to offer resource efficiency advice to tourism companies - will also advise on energy and water soon.

HIT Scotland Sponsorships - Sponsored two scholarships on sustainability this year - to help educate the next generation of tourism employees - continuing through 2014.

Resource Efficiency Audits - Free on site audits available to ID potential cost and carbon benefit of energy, water and materials efficiency - contact Denise Connelly if you are interested.

Case Study Development - Looking for potential case studies to promote - we can prep and promote them.

Food Waste Prevention and Management Guide - New guide online before the end of September - help to get ready for new regulations - joint ZWS/CESA publication.

Smart Phone App for small retailers - App available by end of September - to help corner shops and takeaways to reduce waste and cut costs - Apple and Android availability.

Interim Manager Support - Free access to staff resource for specific projects if appropriate.

Support for Major 2014 Events - Working with key stakeholders to build in resource efficiency to the major events and make sure we get a lasting benefit once they're over.

TS2020 Digital work-stream facilitated session by JF & GR Scottish Enterprise

A presentation by Graeme Rennison and Julie Franchetti

Notes taken from the slides (slides available separately)

JF - As you are aware we recently carried out an online survey of tourism businesses in Scotland as part of a bigger piece of work aimed at scoping out and defining the requirements and delivery options for a new "Digital Tourism" programme of business support. This work is in response to 'Tourism Scotland 2020' to encourage efficient and effective use of online technologies will enhance the customer journey before, during and after their visit and will help meet customers' ever-increasing

digital expectations. It also responds to SGs ambitions for Scotland Digital Future Strategy Early discussions between Scottish Enterprise, the Scottish Tourism Alliance, VisitScotland and the Scottish Government have indicated a strong willingness to co-develop the digital agenda for tourism and establish a comprehensive programme of support. This not only complements the Digital Future strategy, but also reflects the direction of Tourism Scotland 2020.

Today we want to share some very recent survey results from tourism business in Scotland and how they're faring in the digital age....

- How they interact with customers
- The obstacles and pressure points
- Their plans for the future
- Their overall support needs.

Context

- Scotland's Digital Future Strategy
- Connectivity
- Scotland 2020
- Scottish Enterprise, Scottish Tourism Alliance, Scottish Government, VisitScotland, Highlands & Islands Enterprise

Why Research the Project?

- Achieve business efficiencies, growth and improved customer service
- Improving visitor access to information and services

The always connected traveller - 73.4% of the worlds population subscribe to wireless services.

<http://www.futuretravelexperience.com/2011/06/amadeus-report-explores-future-impact-of-mobile-technology/>.

Benefits of Digital

- Customers
 - Easy access to detailed information about known and unknown destinations
 - Fast and easy Booking on-line
 - Can share experiences and advice
 - Increased consumer confidence and desire
- Businesses
 - Market to the world cost effectively £
 - Speak directly to future, existing and past customers with ease
 - Free Market Intelligence
 - Develop and Grow Business £

<http://www.examiner.com/article/changing-technologies-communication-benefits-the-tourism-industry>

Digital Tourism Project

- To define the requirements and delivery options for a new 'Digital Tourism' programme of business support via
 - Stakeholder Group (***JF offered for anyone around the table to sit on the group if they wish***)
 - Online Survey

- STA Council
- 4 focus groups
- Review of current support

Online survey: Aims & Objectives

We conducted the survey with tourism businesses, those who provide strategic and practical support, and stakeholders in the industry.

In the context of Tourism Scotland 2020 those questions are:

- Are tourism businesses “digitally equipped” ?
- Do they have the right level of tools and resources?
- Are they marketing online, and to what extent ?
- Do they need further training and support ?
- Survey took place August 5th -16th – at the tail-end of the busy holiday period.
- Good geographical spread of 157 responses
 - Edinburgh and Glasgow 46%
 - Aberdeen, Dundee and HIE 24%
 - Fife 6%
 - Stirling and Perth 13%
 - Dumfries and Galloway and the Borders 3%

Whatever the sample size, we had a strong consistency among respondents. No reason to suggest that a bigger sample would have produced significantly different results.

Online Survey: the good news!

- A lot of good news, as it does portray an industry that is web-savvy and digitally aware (I’ll come back to this issue later, however).
- So, asked to what extent you use the Web for your business (for things such as a-bookings), a big majority of just under 70% see the Web as “integral”, with another 20% using it on a daily basis.

Contradictions worth considering

- There are some contradictions to point out, and which we should consider
- For example, well over 80% of respondents say they have high-speed broadband, or even “industrial strength” direct connections or “leased lines”.
- YET 47% of the total respondents could not identify their actual connection speed.
- This might suggest that business isn’t making the most of its speed, or maybe isn’t as “digital” as it thinks. Frankly we cannot tell.
- Similarly, two thirds of respondents tell us that their e-commerce websites are properly enabled for mobile devices. Anecdotally, there is reason to doubt that figure. Could it be that these businesses do not really know whether their websites should be optimised for m-commerce?
- In addition, a minority – just 28% -- say their sites cater for people with accessibility needs: definitely a market opportunity that’s being missed
- Scotland Wide online accessibility training tool – launching January 2014

We’ll be examining points like this with our focus groups later in the month.

Using digital to its fullest extent?

Are they using digital to its fullest extent? Emphatically no.

Nearly 90% of respondents believed they could be doing more with digital.

Most commonly this means they could be reducing costs especially the cost of acquiring new customers.

And overall, those new customers are most likely to come from further afield. Both from the rest of the UK and from overseas markets everywhere.

The three key barriers to improvement are – predictably for small and medium sized businesses–

- a lack of management time,
- lack of digital knowledge
- limited resources both financial and human

Planned spending: Next 12 months...

But our respondents know they have to do more, they want to do more, particularly where they see real benefits such as increased business from the rest of the UK and from international markets. More than three quarters (76%) of respondents expect to spend money on their digital activities during the next 12 months.

As you can see from the graph, that spending ranges from 25% spending less than £1000 to nearly 20 % planning to spend more than £10,000 – a good sign of plans being made

Businesses want to learn more

- These are very honest responses. Although our respondents seem quite bullish about their digital activity, and their plans for the future, there's a clear acknowledge that many of them have a long way to go.
- Business want to learn more, When asked what will help them improve their e-commerce presence, and also adapt to the growing market for mobile or “m-commerce”, our respondents listed three key things:
 - A better understanding of the benefits
 - Further training, and –
 - Access to expert advice.

So there is a yearning to know more, and to access good quality information and guidance.

It is here that there is a place for everyone – industry, organisations providing support, and all stakeholders have a role in defining needs and then meeting them

Knowledge improvement required?

Respondents also want a helping hand – whether that is direct assistance with knowledge sharing, training or other forms of support.

The priorities included:

- E-commerce
- M-Commerce
- E-Marketing
- Social media based marketing;
- Managing CRM.

Summary for focus groups

- Business: What are their customers' digital expectations and how can they be met? **12 & 17 September**
- Industry Representatives: At what level are we performing, who is lagging behind, and why? **18 September**
- Stakeholders: Do current support services really inspire adoption and growth? If not,

why not? **20 September**

There is plenty there for our focus groups to discuss later this month, and for us to consider today. I've summed these up as follows:

For businesses all over Scotland, as they communicate with their customers increasingly more often online, the questions must be where are the "digital gaps" and how can we address them? Those gaps might be in broadband speeds, or customer service, or in new forms of marketing.

Many respondents told us they want to know more, for example about improving web content or using social media marketing. And this even though a large proportion of them are already using Facebook, Twitter, LinkedIn and YouTube (these 4 were identified as the most popular social media channels).

For stakeholders, we have to ensure that everyone is pulling in the right direction, if we are to achieve the targets within 2020.

Help us understand.....questions to the audience

- *How are your areas performing digitally – are they in line with current customer expectations?*
- *Who are your Champions?*
- *What Challenges are the businesses facing generally?*
- *Where is the dividing line in terms of who is responsible – businesses? Government?*
- *Is the collective business and public sector community sufficiently equipped to give the Tourism sector what they need?*
- *Ideal world scenario – what would you offer?*

Responses:

There isn't a shortage of training opportunities the problem is the uptake, particularly by small businesses. The larger businesses are financing and running their own training but this is not the case at the lower end. The key is around the messaging to get across to SMEs how important an issue this is and the opportunities that are out there.

Do you think across the industry there is a sufficient and adequate understanding of the technology and the way it is moving - in terms of what do you invest in / what should you be investing in / what type of training is required. There may be a lack of knowledge/awareness underpinning. The flip side being if you are not at the front end of technology you are at risk of losing hundreds of pounds by the day, but not everyone has the money to invest.

Many businesses do not have any idea what they are doing.

Highlands is not a great broadband area, which is a problem for small businesses at the speed in which it is going.

What is the timeline for the government's connectivity programme? There is a broadband delivery group in place; GR offered to provide feedback and would welcome any comments.

Is there any financial support for small companies? JW - we are looking at this.

Industry and public sector are sitting down together for the first time to thrash out what the issues are. Some thought should perhaps go into what is a longer term service support. Funding it direct to the individuals is not a good idea; what we should be doing is get the message out if you invest in this you will be sustainable. It is essential to the survival / progress of your business. Is it about growth? - businesses who can generate scale will be those who generate growth. If you can get a mass group to increase by a small % that would be a great result. There is also a mass group that will never change,

but there is also a group in the middle that don't know a lot but have the capacity and capability to deliver. Then there are those at the top who will race ahead.

What is the best way to achieve?

There is also the issue in the skills agenda that ITT training has gone down significantly over the last 2 years. It is about funding the resource at school level both from a pupil and teacher perspective to ensure the development from the bottom level.

18 September focus group - currently there are **no** representatives from NTS, B&Bs, youth hostels, BHA, Farmstay, ASVA, BH&HPA. It's about having as much representation from across the industry as possible.

JF - We need to be clear at the end of the project - what are the challenges and what are the gaps we are we trying to address.

ACTION - *JF* to send the report to the STA for circulation to the council and would welcome feedback.

STA

STA Future Pulse Surveys

MC referred to the proposed Draft "Pulse Check" surveys that had been circulated with the papers. It is proposed that the STA will send out the surveys on a monthly basis with the link and prompt to complete embedded in the e-newsletter. The Passenger travel surveys would be sent direct to the relevant operators ie only the survey with the 5 short questions being put up for completion.

MC advised that IF (Outer H) - raised advance concern re the ask of industry for another form to be completed when they already have, as do many destinations, a business barometer in circulation.

MC - Acknowledges this however it is apparent not all businesses fill them in and many sectors don't report in a semi formal fashion on a monthly basis. It is imperative the STA has up to the minute 'state of the nation' data readily available as the organisation is increasingly being asked by both the media and Government, ie the Tourism Minister, to comment/provide facts on how the industry is performing. The STA will look to liaise directly with those associations/organisations that already have data capture in place to ascertain a way of populating the information. We will communicate separately with destinations and other organisations to ask them to complete the survey, providing they haven't already provided the information via another source, which the STA can access.

MC - There is a need for consistency of messaging and transparency on performance. There is an ask for the council members when circulating to their members that they are encouraged to complete it.

HB - There is already a business barometer in circulation by the Moffat Centre and ASVA also do surveys. Why do we need more surveys?

MC - STA currently only get a gauge on performance through conversation. The survey is not intended to give businesses more work hence few questions and not time consuming. An early ask from within VS was to find a means of how we can get a snapshot on performance the STA thinks this fits.

RW - A great idea.

MC - If there is something out there already please let me know as I may not have seen it. The survey

results will be presented via Survey Monkey with the results available in pie chart format and will be available on the STA website. The feedback we get from the surveys will also assist in development going forward. Raising awareness is the key. .

HB - Can the STA populate the Moffat Centre barometer and present under one key area of reference?

Scottish Tourism Week 2014 Update

There is general consensus from some of the sectoral groups to incorporate a sub-sector conference programme into the 2days. Wild Scotland, RYA and SDMA being some of these - a working group to be put together to move forward.

MS and CB to advise the dates for the Argyll and Deeside conferences if going ahead.

Innovation Centre Bid

The bid was unsuccessful, however, we did receive very good feedback. The result being that some of the projects from the bid are very likely to be advanced, particularly the skills segment. MC thanked the council members for their support.

Sir Ian Wood via The Wood Commission has been assigned the responsibility to explore student progress from school through to the work place. Sir Ian Wood will be presenting at the Leadership Group meeting on 11 September - **ACTION**: circulate the 'Terms of Ref' to the council for any feedback ahead of the meeting.

Questions for Fergus Ewing (26 September)

It will be an informal format with SL putting the questions to the Minister. We have a commitment from government that any question put forward will be answered and the answers will be put onto the STA website.

Summary Updates

Thanks to those who sent in an update. It is important to keep people informed of what is going on. The public sector has also been asked to provide a summary for the Leadership Group meetings going forward.

For future council meetings there is a request the paper is emailed to Elaine/Marc 1 week before the meeting to enable them to be circulated with the other papers.

There was a request for a template of guidelines,
Action MC to provide this.

There is an assumption that what is reported will be transparent.

JS suggested it might be better to have one report with key points rather than have 20 separate reports. There are 2 different reports here - a council facing report and a web facing synopsis. A Strategy update report will also be provided in next and future newsletters.

All reports will be uploaded onto the STA website under the relevant arm of the strategy.

Skills

There are 3 national Skills Scotland career fairs in September and October, which SDS and Springboard are co-ordinating. There will be a Tourism stand rather than a Hospitality stand. There was an ask for support at the one being held in Aberdeen. Details are on the STA website (ADD LINK HERE).

Future Meeting Dates

- 5th November 2013
- 18th February 2014
- 16th April 2014

Meeting closed at 2.15pm

Proposed next agenda suggestions - Future TIS Guide development / What's needed for Innovation.