



**WESTER ROSS
TOURISM DEVELOPMENT STRATEGY
NOVEMBER 2015**

**PREPARED FOR VISIT WESTER ROSS
by
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1. SUMMARY – WESTER ROSS TOURISM DEVELOPMENT STRATEGY

VISION

Wester Ross will be a first choice Highland destination for loyal repeat visitors and new high spending visitors who seek authentic, fulfilling and memorable experiences delivered by people who work together to extend the tourism season by sharing their passion for their unspoiled landscapes and communities.

2. INTRODUCTION

Wester Ross is an area of the North West Highlands with a population of 6,000. The main population centres are Ullapool, Gairloch and Lochcarron, although there are a large number of smaller villages and rural communities.

Tourism is a key component of the local economy. 16.1% of Wester Ross's working population are employed in the distribution, hotels and catering sector, compared with 9.3% across Highland region as a whole. Distribution, hotels and catering is the largest employment sector in Wester Ross. In addition, 23.1% of local housing stock is used as second or holiday homes. This compares with 6.2% across Highland region as a whole. *(All figures from Highland Council, "Wester Ross Facts and Figures" appendix to Wester Ross Local Plan)*

Visit Wester Ross is one of a number of local tourism and business associations and community organisations with an active interest in developing and promoting tourism. It is the only such body that aspires to represent and support tourism interests throughout Wester Ross, rather than a smaller, more localised part of the area. As such, it is recognised as the foremost private sector led tourism body in the area by agencies such as Highlands Council, Highlands & Islands Enterprise and VisitScotland, and has sought to develop an area wide remit by liaising and working in partnership with other localised groups.

Visit Wester Ross developed out of the earlier Celtic Fringe tourism group, which primarily focused on the National Scenic Area of Wester Ross. Celtic Fringe collaborated with Gairloch & Loch Ewe Action Forum (GALE), a community owned charitable development company, Lochcarron & District Business Association, Gairloch Business Association and Ullapool Tourism

and Business Association on the *Tourism @ Wester Ross Initiative*, which developed and began implementing a Marketing Strategy for the area in 2005. However, the initiative disbanded when it was unable to secure sustainable funding streams to implement the Strategy in full.

Celtic Fringe changed its name to Visit Wester Ross in order to continue to progress elements of the 2005 Marketing Strategy across all of the area. Visit Wester Ross currently has approximately 160 member businesses and organisations.

Visit Wester Ross have now commissioned Tourism and Leisure Solutions to assist in drafting a new Tourism Development Strategy for the area that will identify and prioritise tourism development opportunities to 2020.

3. DEFINING WESTER ROSS

While defining the specific area covered by Wester Ross is probably of limited importance or interest to current and potential visitors, a clear definition is essential to any meaningful strategy document as it clarifies which communities and businesses may come within its remit.

There is no clear agreement on the physical area that Wester Ross covers, particularly as, unlike other destinations such as Argyll, Caithness or Moray, it has never been an administrative entity in its own right. Instead it has traditionally been part of the larger county of Ross & Cromarty. As a consequence, the term Wester Ross can be applied to differing geographical areas.

The Wester Ross National Scenic Area (NSA) was officially designated in 1980 and is the largest of 40 NSAs across Scotland. However, it covers only 58% of the land area considered to comprise Wester Ross by Highland Council and does not include areas such as Applecross, Loch Broom and Upper Loch Torridon, which many consider to be key components.

The proposed Wester Ross Biosphere Reserve, a Scottish Natural Heritage led initiative which is seeking to obtain UNESCO recognition, covers a much larger area that stretches from Achiltibuie and Coigach in the north to Loch Hourn in the south and Garve in the east.

Within Highland Council, Wester Ross is part of a larger Wester Ross, Strathpeffer & Lochalsh ward. The Council's Wester Ross Local Plan covers an area that stretches north to south from Coigach to the south shore of Loch Carron, and goes as far east as the most westerly edges of Loch Glascarnoch and Loch a'Chroisg.

Rather than get too bogged down on geographical details, for the purpose of this Tourism Development Strategy we have broadly adopted the area outlined in the Highland Council Local Plan, but have extended it slightly eastwards to incorporate both Achnasheen and Aultguish, which we suggest have more in keeping with the topography and landscapes of Wester Ross than its neighbour Easter Ross.

We note that the memberships of some of the business groups based within Wester Ross include businesses and organisations outwith this area. Therefore, we would recommend that boundaries should be kept flexible in order to encompass and work with all businesses and organisations that want to associate themselves with Wester Ross.

4. METHODOLOGY

Tourism and Leisure Solutions undertook the following stages of work in order to inform this Tourism Development Strategy.

4.1. *Review of Relevant Policy & Strategy Documents*

The aim of this review was to identify national and regional policies and strategies that are likely to impact upon a Wester Ross Tourism Development Plan. Any successful Development Plan will require to align with other relevant policies and strategies in order to draw benefit and value from them.

Documents reviewed include -

- The national Tourism Scotland 2020 Development Framework developed by the Scottish Tourism Alliance and supported by all national public sector tourism agencies
- The Highland Tourism 2020 Action Plan, that seeks to deliver the national strategy in the Highlands.
- Highlands and Islands Enterprise, Building Our Future, Operating Plan 2015 – 2018.
- VisitScotland “Tourism in Scotland’s Regions 2013” report of July 2014.

- VisitScotland “An Overview of Our Target Segments” factsheet (2014).
- VisitBritain Statistics & Insights Reports on inbound tourism into the UK.
- Highland Council Wester Ross Local Plan (2006).
- Highland Council Wester Ross NSA Environmental Improvements Options Appraisal, Final Report – May 2015.
- Wester Ross Biosphere Reserve Application, September 2015.

4.2. ***On-Line Survey of Visitors to Wester Ross***

The aim of this survey was to gather information on motivations for visiting Wester Ross and the types of experiences that visitors enjoy when in the area. A total of 37 responses were received. 24 responses (65%) were from females and 13 (35%) from males. The breakdown of respondents by age and place of residence is outlined in the tables below.

Table 4.2.1. Visitor Survey Respondents by Age

Age Group	No. of Respondents	% of Respondents
20 – 29	3	8%
30 – 39	5	14%
40 – 49	17	46%
50 – 59	9	24%
60+	2	5%
No Response	1	3%

Table 4.2.2. Visitor Survey Respondents by Place of Residence

Place of Residence	No. of Respondents	% of Respondents
Central Scotland	11	30%
North of England	9	24%
South of England	8	22%

North of Scotland	3	8%
Netherlands	2	5%
Wales	2	5%
Germany	1	3%
No Response	1	3%

It is impossible to comment on how representative a sample of visitors to Wester Ross this is, as VisitScotland visitor profiling data is not currently broken down below the regional Highlands level.

However, Highlands data indicates that, throughout the region as a whole, Scots represent the greatest proportion of visitors. Our visitor survey generated the greatest number of responses from visitors resident in England and, therefore, may overstate the importance of the English market to the area. Nonetheless, responses do give useful insights to visitor experiences and priorities.

4.3. ***Online Survey of Visit Wester Ross Members.***

The aim of this survey was to gather the views of local tourism operators on opportunities, barriers and priorities for developing tourism in Wester Ross.

A total of 26 responses were received. This represents a 14% response rate from the Visit Wester Ross membership. A breakdown of respondents by type and location is outlined in the tables below.

Table 4.3.1. Business Survey Respondents by Type

Type of Business	No. of Respondents	% of Respondents
Non Serviced Accommodation Operator	12	46%
Serviced Accommodation Operator	8	31%
Activities Operator	3	11%
Restaurant/Café	2	8%

Arts & Crafts Operator	1	4%
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Table 4.3.2. Business Survey Respondents by Location

Location of Business	No. of Respondents	% of Respondents
Gairloch	10	38%
Aultbea/Poolewe	6	22%
Dundonnell/Laide	2	8%
Kinlochewe/Loch Maree	2	8%
Torridon/Sheildaig	2	8%
Applecross	1	4%
Lochcarron	1	4%
No Response	2	8%

These survey responses are very much skewed towards the accommodation sector and the parts of Wester Ross where Visit Wester Ross has the majority of its members. It is noticeable that there are no responses from businesses in Ullapool and Coigach and low levels of response from businesses in Applecross and Lochcarron.

Despite these weaknesses, the survey does provide some indications of trends in local tourism and possible priorities for its future development.

4.4. **Stakeholder Consultations**

The aim of these consultations was to gather views, comments and suggestions from stakeholders in partner agencies and businesses with whom Visit Wester Ross currently works. A number of consultees suggested further individuals to contact and, in the end, consultations were held with 23 representatives of 19 agencies or facilities. The majority of consultations were held face to face, with a minority – just under 20% - being conducted by telephone.

The full list of stakeholder consultees was as follows –

- Scott Armstrong, VisitScotland Regional Partnerships Director – North of Scotland
- Leah Ball, Gairloch & Loch Ewe Action Forum (GALE), Tourist Information Officer

- Gareth Clingan, National Trust for Scotland, General Manager, North West Highlands
- Alec Cormack, Lochcarron & District Business Association Membership Secretary and Visit Wester Ross Committee Member
- Fran Cree, Fionncroft B&B and Self Catering & Visit Wester Ross Chair
- Maren Ebeling, Scottish Natural Heritage, Tourism Officer
- Claire Farquhar, North Highland Initiative, Communications & Project Manager
- Judith Fish, Applecross Inn Owner & Applecross Community Company Chair
- Mary Gibson, Scottish Natural Heritage, Area Officer
- Rosalyn Golding, Gairloch Heritage Museum, Project Curator
- Paula Gordon, Isle of Ewe Smokehouse Owner & Visit Wester Ross Committee Member
- Sharon Longley, The Old Inn, Gairloch & Gairloch Highland Lodge, Manager
- Jack Mackay, Forestry Commission Scotland, Inverness, Ross & Skye Forest District
- Hazel MacLean, Forestry Commission Scotland, North Highlands Forest District
- Stuart MacPherson, Highlands & Islands Enterprise, Head of Operations, LSWR
- Janet Miles, Gairloch & Loch Ewe Action Forum (GALE), General Manager
- George Milne, Russian Arctic Convoy Museum Project Chair
- Kevin Peach, Ullapool Harbour Trust, CEO & Harbourmaster
- Alastair Pearson, The Old Inn, Gairloch & Gairloch Highland Lodge, Owner/Proprietor
- Dan Rose-Bristow, The Torridon Hotel & Torridon Inn, Owner/Proprietor
- Colin Simpson, Highland Council, Tourism Co-ordinator

- Philip Waite, Highland Council, Access Officer – Ross & Cromarty
- Mat Webster, Scottish Youth Hostels Association & Visit Wester Ross Committee Member
- Emma Whitham, Highland Council, Project Manager

Sincere thanks are due to all consultees for their time and input to this Tourism Development Strategy.

4.5. ***Wester Ross Visitor Products & Services Audit***

The compilation of such an audit was not within the original brief for this project. However, as research, surveys and consultations progressed, it became obvious that there was a lack of clarity about what exactly Wester Ross has to offer visitors and what its product/service strengths and weaknesses are.

Therefore, we decided that an audit would help to provide some level of empirical data that could provide a more robust platform from which to develop proposals and recommendations for a Tourism Development Strategy.

The audit was compiled through analysis of online and printed information sources, and, in some cases, by simply noting facilities and operators during visits to the area. Like all audits of this nature, it cannot claim to be 100% accurate, particularly as not all local operators appear to have an on-line presence or advertise in local listings and publications. Similarly, we strongly suspect that some of the online information sources to which we referred may be out of date. Therefore, some of the facilities in the audit may no longer be operating.

In addition, we found many examples where different sources of information use different names for facilities. This is particularly true of walks in the area, where a single walk could be called several different names. We have attempted to identify and remove all duplicated facilities, but undoubtedly will have missed some due to our lack of detailed local knowledge.

It should also be noted that there are a number of facilities and services in this audit that are not obviously visitor focused but are, nonetheless, members of local business associations that are active in the tourism sector. We have included such facilities on the grounds that it is not for us to determine who is and who isn't working with tourism markets.

In addition, a number of operators have entries under more than one category. This is to recognise that they offer and actively promote a variety of different products and services.

Overall, the audit identified just over 1,000 different products and services in Wester Ross. The table below breaks these down by type and location.

Table 4.5.1. Wester Ross Visitor Products & Services by Type & Location

<i>Type of Product or Service</i>	<i>No in Achiltibuie / Coigach</i>	<i>No in Apple-cross</i>	<i>No in Aultbea/ Poolewe</i>	<i>No in Dundonnell/ Laide</i>	<i>No in Gairloch</i>	<i>No in Kinlochewe/ Loch Maree</i>	<i>No in Lochcarron/ Strathcarron</i>	<i>No in Torridon/ Sheildaig</i>	<i>No in Ullapool</i>	<i>TOTAL</i>
Accommodation Caravan & Camping Parks	1	1	1	4	2	1	2	4	2	18
Accommodation Guest Houses & B&Bs	6	2	3	6	18	2	11	1	44	93
Accommodation Hostels	1	1	0	2	1	1	2	1	5	14
Accommodation Hotels	1	1	4	2	5	3	2	3	10	31
Accommodation Sporting Lodges	0	0	0	1	0	2	1	0	4	8
Accommodation Self Catering	26	5	18	9	37	1	35	8	56	195
Activities Angling	2	0	1	3	4	2	6	2	8	28
Activities Cycling	2	1	4	2	3	1	12	1	1	27
Activities Equestrian	0	0	0	0	1	0	0	0	0	1
Activities Field Sports	0	0	0	1	0	2	1	2	4	10
Activities Golf	0	0	0	0	1	0	1	0	1	3
Activities Indoor	0	0	1	0	1	0	0	0	1	3
Activities Marine	2	1	1	1	5	1	1	2	8	22
<i>Type of Product or Service</i>	<i>No in Achiltibuie /Coigach</i>	<i>No in Apple-cross</i>	<i>No in Aultbea/ Poolewe</i>	<i>No in Dundonnell/ Laide</i>	<i>No in Gairloch</i>	<i>No in Kinlochewe/ Loch Maree</i>	<i>No in Lochcarron/Strathcarron</i>	<i>No in Torridon/ Sheildaig</i>	<i>No in Ullapool</i>	<i>TOTAL</i>
Activities Others	3	1	1	1	0	0	2	0	3	11
Activities Outdoor	1	2	0	0	5	0	2	1	6	17
Activities Sailing	1	0	0	0	4	0	1	1	3	10
Activities Walking	15	12	14	15	15	14	39	19	14	157
Arts & Crafts	3	7	5	2	10	1	21	5	20	74
Business Services	1	0	0	1	2	0	7	0	3	14
Community Groups	2	0	0	1	3	0	2	1	3	12
Events	3	4	3	0	3	0	2	3	12	31
Food & Drink	3	6	11	2	15	3	10	7	24	81

Forests & Gardens	1	1	3	4	0	1	3	2	4	19
Heritage	0	3	2	3	1	0	2	0	2	13
Motorist Services	1	1	0	2	1	1	4	0	3	13
Nature	2	0	0	2	2	3	0	4	5	18
Public Services	0	1	2	0	6	0	5	1	16	31
Retail – General	1	1	1	3	7	1	2	1	6	23
Retail - Specialist	1	0	1	0	2	0	0	0	7	11
Trades & Services	1	1	0	4	0	0	2	0	21	29
Transport & Tours	0	0	0	1	2	0	3	0	5	11
Visitor Information	0	0	0	0	1	0	1	0	1	3
Websites	1	3	2	1	1	1	1	4	2	16
TOTAL	81	56	78	73	158	41	183	73	304	1.047

An appendix at the end of this report provides an Excel spreadsheet that lists all the entries included in the audit.

What the audit shows is that there is an impressive spread of facilities across all parts of Wester Ross with the main clusters being in the three largest population centres of Gairloch, Lochcarron and Ullapool. It is interesting to note that, of the other smaller communities, Achiltibuie & Coigach has the largest number of facilities largely thanks to its wide range of self catering accommodation.

The audit highlights the strength of the non-serviced accommodation sector in Wester Ross. Using available data and conservative estimates where relevant data is not available, we estimate that there are just over 5,300 visitor bedspaces available in Wester Ross at peak season. These are broken down as follows.

Table 4.5.2. Breakdown of Visitor Bedspaces by Type

Accommodation Type	No. of Bedspaces	Explanation
Camping & Caravan Parks	2,010	Based on 2 persons per pitch
Guest Houses/B&Bs	640	Based on estimate of 4 beds per property unless otherwise specified by operators
Hostels	325	Based on actual capacity figures
Hotels	860	Based on 2 persons per room unless otherwise specified by operators

Sporting Lodges	150	Based on actual capacity figures
Self Catering Properties	1,330	Based on 4 persons per property unless otherwise specified by operators
TOTAL	5,315	

This table highlights that almost 70% of peak season bedspaces in the area are in the non-serviced accommodation sector. This maybe reflects the proportionately high use of local housing stock as second or holiday homes. It is also interesting to note that the area has capacity to increase its population by almost 90% in peak season.

The audit also indicates that Wester Ross has a strong critical mass of product and services in the Activities sector – particularly walking -, Arts & Crafts and Food & Drink. Conversely, the Heritage sector appears to be relatively weak, which perhaps is no great surprise given that Wester Ross has no genuinely iconic built heritage such as castles, churches or historic houses that are open to the public. Similarly, the Speciality Retail sector appears to be under represented, although this is at least partly offset by the strength of the Arts & Crafts sector.

Overall, the audit reinforces perceptions that Wester Ross has an extensive outdoor visitor offer, but significantly fewer indoor or all-weather facilities.

4.6. **Audit of Wester Ross Organisations**

Finally, at a late stage in the preparation of this report, it was decided to undertake an audit of all organisations in Wester Ross with any direct or indirect interest in tourism and visitors. The aim of this audit was to try to identify what does what in relation to tourism in the area and how they generate funding for their activities.

Through this audit, which is detailed in Appendix 2 at the end of this report, we identified 18 local organisations that undertake some degree of visitor facing activity. We have only included those organisations whose online information specifically highlights tourism related activities. Consequently, the audit includes some local Community Councils, but not others whose minutes and reports make no direct reference to tourism.

Of these 18 organisations, only Visit Wester Ross focuses solely on visitor related activities and covers the whole of the region. Other organisations combine tourism-related activities with other wider economic, environmental or social projects.

We also identified a further 10 websites that provide visitor facing information about Wester Ross and include listings of local businesses. We felt it useful to include these websites in the audit as a number of them rank very highly on search engines. We have not included the websites of individual businesses that may provide wider local information.

It is unclear who set up and manages a number of these websites and how up to date some of the information on them actually is. However, as an example, the www.ullapool.co.uk website is uncredited and appears to include information that has not been updated since 2009. However, it still ranks first on searches under Ullapool and may still be search engine optimised.

The audit highlights that there is an extensive range on online information about Wester Ross, some of which is of uncertain provenance and accuracy but is still likely to be accessed and used by potential visitors to the area.

5. THE NATIONAL & REGIONAL TOURISM CONTEXT

As previously stated, any Wester Ross Tourism Development Strategy must recognise, align with and draw benefits from tourism strategies at national and regional level. Below we summarise the main strategic documents with which Wester Ross must work.

5.1. *Tourism Scotland 2020 Development Framework*

The national Tourism Scotland 2020 Development Framework projects that the main growth markets for Scottish tourism will be the “Home Turf” (i.e. domestic UK markets) and “Near Neighbours” (i.e. Western European markets). These markets will be attracted to Scotland in increasing numbers by Providing Authentic Experiences and Improving the Customer Journey.

Providing Authentic Experiences will focus on improving the visitor experience in four main areas.

- Nature, Heritage & Activities.

- Destinations, Towns & Cities.
- Business Tourism.
- Events & Festivals.

Improving the Customer Journey will focus also focus on four main areas.

- Food & Drink.
- Transport.
- Accommodation.
- Digital Connectivity.

The national framework identifies four main areas where Scottish tourism will need to build its capabilities in order to deliver strategic tourism objectives.

- Quality & Skills
- Marketing
- Sustainable Tourism.
- Leadership & Collaboration.

5.2. ***Highland Tourism Action Plan 2020***

The Highland Tourism Action Plan 2020, which has been produced by the Highland Area Tourism partnership, outlines the priorities and activities that will be undertaken to grow tourism in the Highlands between 2014 and 2020. These priorities and activities align with the national framework and identify six key assets with real growth potential in the Highlands.

- Activities & Adventure.
- Business Tourism.

- Cruises.
- Golf.
- Mountain Biking.
- Sailing.

The Highland Action Plan identifies three key areas of activity that need to be addressed to grow tourism across the region. Each of these three areas of activity identify a number of specific priorities.

- Marketing.
 - Improving links between destination organisations and VisitScotland marketing activity.
 - Encouraging joint activity and cross promotion between destination organisations.
 - Producing a plan for the future delivery of visitor information in the Highlands.
- Advocacy on key issues to ensure the needs of tourism and tourism businesses are recognised.
 - Broadband provision.
 - Mobile connectivity.
 - Strategic transport infrastructure.
 - Public transport.
- Improving the Tourism Product
 - Enhancing the gathering and analysis of customer feedback.
 - Providing a range of events that support and encourage business development.
 - Enhancing customer service through the National Skills Strategy for Tourism.

- Improving infrastructure that supports potential growth markets.

5.3. ***VisitScotland Target Segments***

VisitScotland has undertaken a segmentation exercise that identifies 5 UK market segments that are likely to provide the best return on marketing investment. These segments will be given priority in VisitScotland's UK marketing programmes and are as follows.

- Adventure Seekers, who seek active holidays where they can enjoy both outdoor and cultural activities that push their limits and experiences.
- Curious Travellers, who enjoy travelling as a hobby and have an overwhelming desire to explore new destinations and discover new things.
- Engaged Sightseers, who take numerous breaks in a year and enjoy general sightseeing and touring.
- Food-Loving Culturalists, who enjoy short breaks in the UK and seek out relaxing experiences with great food and drink and engaging cultural experiences.
- Natural Advocates, who are passionate about Scotland where they unwind, recharge and enjoy quiet time.

A similar segmentation exercise has not been undertaken for overseas markets. However, International Passenger Survey (IPS) figures for the Highlands in 2013 indicate that the three main overseas markets in the region are –

- Germany (20% of overseas visitor trips & 15% of overseas visitor spend)
- USA (14% of overseas visitor trips & 15% of overseas visitor spend)
- France (12% of overseas visitor trips & 11% of overseas visitor spend).

6. STRENGTHS, OPPORTUNITIES, INHIBITORS & THREATS

This section of this report seeks to pull together and summarise the main findings of the Visitor Survey, Business Survey and Stakeholder Consultations. These three exercises generated a wide range of comments and opinions from over 80 individuals with an interest or stake in tourism in Wester Ross. We have sought to identify the main themes and issues that were raised.

6.1. Visitor Survey

The Visitor Survey indicated a high level of loyalty to Wester Ross, with 43% of respondents normally visiting the area once a year and 27% visiting more regularly. This response may be expected as committed Wester Ross enthusiasts are most likely to respond to a survey of this nature.

Almost half of respondents normally visit the area in July or August, although over a third are likely to visit in both May/June and September/October. 1 week is the most common length of stay, although a quarter will normally stay for 2 weeks per visit.

Scenery is the most popular element of Wester Ross, cited by 78% of respondents as one of the aspects of the area they most enjoy. The friendly local people and wildlife are the next most popular elements of a visit and are both cited by 22% of respondents.

The activities that visitors most enjoy in Wester Ross are walking (54% of respondents); enjoying the scenery (35% of respondents); eating out (also 35%); relaxing (24%) and watching wildlife (22%).

When asked what elements and aspects of Wester Ross could be improved, 30% of respondents identified no need for any improvements. Most of these respondents also included

a comment about not “over developing or spoiling” Wester Ross. 16% identified a need for better visitor information provision and 11% identified a lack of places to visit out of season.

Finally, respondents were asked the main things that Visit Wester Ross could do to encourage them to visit the area more often. A quarter cited providing more visitor information. Most respondents cited particular types of information, most commonly information on local walks and wildlife. More visitor information was the only response cited by more than 10% of respondents.

6.2. ***Visit Wester Ross Members Survey***

62% of respondents to this survey indicated that they operate their business all year round. Those who operate seasonally only primarily open from Easter – October.

A majority of respondents identified UK visitors as their main market, although over a quarter also identified European visitors as an important market segment in the peak season months. A third of respondents identified that couples represent a main visitor market for their business. A quarter identified family groups as a key segment for their business.

When asked if they had noticed any changes to visitor types in recent years, a third of respondents had not. However, just over a quarter identified an increase in the number of European visitors. No other changes were identified by more than 2 respondents.

When asked to identify any changes in visitor expectations and behaviour in recent years, over 60% of respondents cited greater demand for wi-fi facilities and 40% identified greater use of on-line booking. 15% also identified a move towards shorter average lengths of stay. However, almost 20% identified no change in visitor expectations and behaviour.

Respondents were asked which elements of Wester Ross their feedback suggests that visitors most enjoy. As with the visitor survey, scenery was identified as the most popular element of Wester Ross, cited by three-quarters of business respondents. The next most cited elements were wildlife, walking and peace & quiet, which were all cited by a third of business respondents.

When asked what elements of Wester Ross they felt visitors would most like to see improved, a quarter of respondents cited the quality of roads, while better public transport, better signage of walking routes and better wi-fi speeds and mobile phone reception were all cited by just over

10% of respondents. Just over 10% of respondents identified the roads, low level walking routes and public transport as priority areas that need to be addressed to grow tourism in Wester Ross. Improving the local food and drink offer was also identified as a priority by just over 10% of respondents.

Finally, when asked to identify the biggest challenges and barriers to growing tourism in Wester Ross, just under 20% of respondents cited the weather, both in terms of visitor perceptions of the local weather and the adverse impact weather has had on the 2015 season. 15% cited midges or, again, visitor perceptions of midges in the area. 15% of respondents highlighted concerns about a lack of available funding to maintain and improve local facilities and just over 10% raised concerns about a lack of co-operation and collaboration between local agencies and local businesses.

6.3. ***Stakeholder Consultations***

The Stakeholder Consultations provided opportunities to test some of the outcomes of the visitor and business surveys, but also identified a number of clear themes and specific issues in their own right, including the following..

- Wester Ross is an area of small, scattered communities with little culture of working together. There is also often limited collaboration between businesses in individual communities. Despite some specific examples to the contrary, many businesses tend to “do their own thing” in terms of both marketing and product development.

- Local businesses can feel remote from regional and national agencies who they feel tend to engage in limited local collaboration. Businesses and organisations have limited awareness and understanding of national or regional tourism strategies.

- Although they understand the reasons behind them, businesses and organisations have concerns about reductions in public sector spending on maintenance of local infrastructure - roads in particular.

- Seasonality is a major issue which some stakeholders believe is becoming more rather than less pronounced, although others consider to have become less of an issue. A number of stakeholders noted that, while demand for accommodation can outstrip supply for 3 – 4 weeks a year, other times of year are very quiet.
- Linked to seasonality are major issues of staff recruitment and retention, and a lack of affordable housing for key staff. Many businesses have to bring staff into the area, but the relatively short season and the lack of affordable accommodation makes it difficult to attract quality, experienced people.
- A significant minority of local tourism operators are perceived to be lifestyle businesses with little inclination to grow their customer base. A number of stakeholders commented that the proportionately large scale of the local, self catering sector may reflect either businesses moving out of bed & breakfast operations or second home owners being unable to sell their properties.
- Notwithstanding the above, some stakeholders commented that local accommodation standards and professionalism in the accommodation sector have improved in recent years and quality operators are able to attract year-round business.
- A lack of public transport is seen as a key issue by many stakeholders, particularly in terms of transport to move visitors around the area once they have arrived. It was commented that visitors staying in the main accommodation centres have little option but to use private cars to get to the main attractions and facilities in the area.
- There is general support for the development of marine tourism in the area, particularly in and around Gairloch and Ullapool. This could encompass marine wildlife watching, sailing, activities such as kayaking, and cruise ships. A number of stakeholders also supported the reintroduction of some form of passenger ferry service between Wester Ross and Skye.

- Stakeholders commented on the importance of pre-arrival on-line information as more and more visitors undertake a growing amount of online research before coming to the area. The growing influence of online review sites was also mentioned. Concerns were expressed that some local operators have not fully embraced IT and social media.
- In general, stakeholders commented on improvements in the local food and drink offer in recent years, but highlighted that quality is still variable and more needs to be done to drive standards up further.
- Stakeholders supported the survey finding about the importance of walking as a visitor activity in the area. A number commented on a need for enhanced signage and promotion of easier, lower level walks that appeal to less committed walkers.
- There is considerable local excitement about the newly launched North Coast 500 initiative. It is seen as offering particular potential to grow tourism in the area and a number of stakeholders stated that they had already generated additional business through it.
- Stakeholders expressed very mixed views on the current and potential value of Wester Ross as a tourism brand. Roughly half felt that further development of an area brand is key to growing tourism, but the other half felt that marketing emphasis should be given to individual villages and communities as they are currently better known than Wester Ross as a whole.
- Finally, each part of Wester Ross appears to perceive that other parts of the area are performing better than them in terms of visitor offer and visitor numbers. In particular, Applecross and Coigach are perceived to be areas that are particularly active in developing visitor facilities and successful at attracting more visitors. This is at least partly attributed to them being smaller, more cohesive communities that have local Development Officers to support community-led initiatives.

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7. NEW INVESTMENTS & PROJECTS

There are a number of committed or proposed new projects and investments that will impact on tourism in Wester Ross and of which any Tourism Development Strategy must be aware. The main ones include the following.

- A new European LEADER programme is due to come on stream in early 2016 and should provide additional funding for tourism projects. We understand that this will be directed through a Wester Ross Local Action Group. This programme may offer potential to secure funding support for various elements of this Tourism Development Strategy.

- The North Coast 500 touring route has been launched in spring 2015 by the North Highland Initiative and promotes a 500 mile road route around the coasts of the North and Northwest Highlands. The route starts and finishes in Inverness and a large proportion of the route passes through Wester Ross. The route has already attracted significant media coverage and significant further promotion and development is planned.

- National Trust for Scotland have committed to a large scale development of new facilities at Inverewe Gardens, the first phase of which is due to open to the public in Spring 2016. Inverewe has traditionally been the most popular visitor attraction in Wester Ross, but has suffered from declining visitor numbers in recent years. The new investment is a signature project for NTS and is intended to attract new and additional visitors.

- Scottish Natural Heritage is coordinating a community-led project to secure UNESCO Biosphere Reserve accreditation for Wester Ross. This would provide international recognition of programmes and projects for the sustainable management of local landscapes, eco-systems and species and could highlight the environmental qualities of the

area and stimulate and support sustainable tourism development projects. Securing UNESCO accreditation will take a minimum of three years.

- Gairloch Museum has secured Round 1 Heritage Lottery Fund support for a feasibility study into the development of a larger, more varied facility at a World War 2 building in the village. If further HLF funding can be secured, it is hoped that work on the new facility can begin in 2017 with completion and public opening in 2019.

- The Russian Arctic Convoy Museum Project is a volunteer initiative to deliver a 3 phase project to interpret and promote the story of the Arctic convoys that operated out of Loch Ewe during World War 2. There is already a variety of interpretive material on the ground along Loch Ewe and the project aims to formalise this into a trail that visitors can follow, establish a temporary exhibition in Inverasdale School and finally set up a permanent museum facility in Aultbea. Timescales and funding for this project are still to be confirmed

- Highland Council are currently reviewing their Wester Ross Core Path Network. While this review is not expected to result in significant changes to the network, it may lead to the addition of a small number of longer distance routes.

- Highland Council have also undertaken a Wester Ross National Scenic Area Environmental Improvements Options Appraisal which has identified a number of opportunities for enhanced visitor interpretation and orientation facilities within the NSA. We understand that budgets are in place to take forward projects if proposals are approved by elected members.

- Forestry Commission Scotland have undertaken a significant investment on new paths at Lael Forest Gardens, which is the most northerly part of the National Tree Collection of Scotland. Further investment is planned over the coming winter. FCS has also drawn up proposals to enhance walking routes and viewpoints at Slattadale and Victoria Falls.

All of these projects – and others – have potential to enhance the visitor experience in Wester Ross.

8. WESTER ROSS TOURISM DEVELOPMENT STRATEGY – INTRODUCTION

The proposed strategy that we outline below follows the “rocket” model used in the national Tourism Scotland 2020 Development Framework. This model has been adopted by a number of area tourism partnerships across Scotland to identify and prioritise development opportunities.

The rocket covers the following key topics.

- Vision – What type of visitor destination does an area want to be?
- Mission – What is the strategy trying to achieve?
- Aim – What are the measurable objectives of the strategy?
- Target Markets – What types of visitors does an area aim to attract?
- Foundations – What are the current inhibitors and threats to growing tourism in an area; what are an area’s key strengths and opportunities; and what is the strategic context in which a strategy will be implemented?
- Providing Authentic Experiences – What are the priority experiences an area will offer to attract increased visitor numbers?
- Improving the Customer Journey – What are the key opportunities to make it easier for visitors to enjoy an area?
- Building Capacity & Capability – What needs to be put in place to ensure an area is able to deliver its strategy?

We will now consider each of these topics in greater detail.

9. VISION

We propose the following vision for tourism in Wester Ross.

“Wester Ross will be a first choice Highland destination for loyal repeat visitors and new high spending visitors who seek authentic, fulfilling and memorable experiences delivered by people who work together to extend the tourism season by sharing their passion for their unspoiled landscapes and communities.”

This vision incorporates the following key elements.

- Working with the Highlands brand to position Wester Ross as a core component of a visit to the internationally recognised Scottish Highlands.
- Reducing seasonality to support more secure quality employment and business growth.
- Attracting new types of visitors while retaining and growing existing visitor markets.
- Focussing on the visitor experience and the benefits of a visit to Wester Ross as the key elements of tourism success.
- Enhancing proactive collaboration between local businesses, organisations and communities.
- Drawing on and celebrating the passion of local residents for Wester Ross.
- Protecting and enhancing the special environmental and social qualities of Wester Ross.

The recommended Vision takes a long term view that is unlikely to be achieved within the 5 years of this Tourism Development Strategy. However, this Strategy should act as a catalyst to businesses and organisations working together to take the first steps towards achieving the Vision.

10. **MISSION**

We propose that the mission of the Wester Ross Tourism Development Strategy should be as follows.

“To bring local businesses, organisations and communities throughout the area together to collaborate on developing and promoting high quality products and services that deliver

authentic experiences to an expanded range of visitor types in order to grow tourism in a sustainable manner that creates opportunities for local people, enhances economic performance and contributes to social cohesion.”

The key elements of this mission are as follows.

- The fundamental importance of collaboration and working in partnership to achieve common objectives.
- The need to deliver quality and authenticity to visitors.
- The importance of economic and social sustainability.
- Recognition that any growth in tourism should deliver benefits to individuals and communities as well as businesses and should enhance quality of life in Wester Ross.

11. **AIM**

Any aims of a tourism development strategy should incorporate measurable objectives. In tourism, these are usually expressed as measurements that project a change in the value of visitor spend in an area. For example, the national Tourism Scotland 2020 Development Framework aims to increase the value of visitor spend across Scotland from £5 to £6.5 billion p/a by 2020.

Unfortunately, there are no up-to-date figures for the value of tourism within Wester Ross. Any economic data we have been able to source either incorporates neighbouring areas such as Lochalsh, Skye and Strathpeffer or dates back to at least 2006.

However, we propose the following aim for the Wester Ross Tourism Development Strategy.

“To increase the contribution of tourism to all businesses and communities in Wester Ross by encouraging new partnerships and collaborations that extend the tourism season, attract new visitor markets and offer additional, high quality and authentic visitor experiences”.

Again, this aim focusses on the key elements of -

- Collaboration and partnership working.

- Seasonality.
- Attracting additional visitors.
- Delivering quality and authenticity.

We suggest that growth in tourism could be measured by the following criteria for which we believe some form of benchmarks already exist.

- The number of tourism-related businesses in the area. (Available from the audit carried out for this report).
- The percentage of tourism-related businesses operating year-round. (Available from the business survey carried out for this report. More work is required to confirm the baseline figure).
- The number of new collaborative projects between tourism businesses, organisations and agencies (As this measures new collaborations, it starts from a baseline of zero).
- Employment within the distribution, hotels and catering sector. (Available from Highland Council).
- Visitor numbers to local attractions and facilities. (Available from the Scottish Visitor Attraction Monitor).
- The number of average daily car journeys made on key access routes into the area. (Available from the Department of Transport).

12. **TARGET MARKETS**

Feedback from local businesses and key stakeholders highlights the importance of local markets to tourism in Wester Ross, specifically day and short break visitors from what could be termed the Inner Moray Firth – the coastal areas around Inverness which are within 2 hours travel time of Wester Ross.

There is a widespread view that these local markets offer significant potential for growth and could be expanded as truck road improvements, such as the dualling of the A9, bring more parts of Scotland within a 2 hour drive time of Wester Ross.

We agree with this view and recommend that such local markets should continue to be proactively targeted. We suggest that more value could be generated from these markets through increased collaboration to create informal packages of day and short break experiences that can be tailored to the requirements of individual visitors.

However, at the same time, we recognise that the total population resident within 2 hours of Wester Ross is very small in UK terms and is unlikely to sustain a prosperous local tourism sector on its own. Therefore, other markets will need to be targeted.

Given the advantages of alignment with national and regional tourism strategies, we recommend that tourism businesses and agencies in Wester Ross should focus on targeting the VisitScotland priority UK market segments most likely to generate additional and new types of visitors to the area.

Each of the five VisitScotland priority segments presents opportunities and challenges in terms of attracting them to Wester Ross.

The **Food-Loving Culturalists** segment, while the most affluent of the five priority segments, is primarily focussed on city based breaks with a strong choice of cultural activities. We do not recommend that Wester Ross targets this segment.

The **Curious Travellers** segment is the largest of the five segments in terms of size and enjoys history and culture as well as scenery and landscapes and trying new things. Wester Ross may not meet this segment's expectations in terms of history and culture. In addition, this segment tend to reject holidays that involve going back to the same place or doing the same things. Given the limited potential to generate loyalty and repeat visits, we do not recommend that Wester Ross targets this segment.

Engaged Sightseers are the least affluent and the oldest of the five priority segments. They enjoy touring and general sightseeing and tend to reject holidays that are too adventurous and take them out of their comfort zone. They are above average holiday makers but more price sensitive than other segments. Perceptions of distance may be a barrier to some. We do not recommend that Wester Ross targets this segment.

This leaves two priority UK market segments on which we recommend that businesses and organisations should focus in order to grow business and reduce seasonality.

Adventure Seekers are an affluent and younger segment that seeks active holidays where they can enjoy both outdoor and cultural activities. They will venture off the beaten track to try new things and push their limits. Holidays really energise them and they are particularly attracted by Scotland's scenery and unspoilt nature. They are above average holiday takers who are most likely to consider Scotland for a short break of 1 – 6 nights and are more likely than other segments to stay in campsites or hostels.

We suggest that this segment offers the greatest potential to attract younger, more adventurous, more affluent visitors to Wester Ross at different times of year.

Natural Advocates are the segment most likely to be resident in Scotland and most likely to consider Scotland for their main holiday of the year. They are predominantly aged 35 – 54 and are passionate about Scotland which offers everything they want from a holiday – scenery, unspoilt nature and getting away from it all. They enjoy gentle outdoor activities – some may travel with a dog – and are above average users of self catering accommodation. They feel they know Scotland well and 95% intend to spend more time in Scotland in the future.

We suggest this segment is the one most closely aligned to the visitor experiences Wester Ross can currently offer and the one with the greatest potential for developing repeat visits.

It should be stressed that the two UK priority market segments that we recommend are in addition to the visitor markets that currently come to Wester Ross. All local tourism businesses and organisations should be working to encourage additional repeat visits and recommendations/referrals from existing markets and should consider how they can encourage additional shoulder and off season visits from them.

In terms of overseas target markets, while resources are likely to limit the extent to which they can be proactively targeted, we recommend that priority should be given to two of our “near neighbours” who offer the greatest opportunities to reach at relatively low cost.

Germany generates 15% of overseas visitor spend in the Highlands, compared to 10% of overseas visitor spend across Scotland as a whole. It is one of the UK's Top 3 inbound markets. Germans like history and famous sites, while wildlife spotting in the Highlands appeals to them.

They prefer accommodation with “character” and plan itineraries in advance in considerable detail.

France generates 11% of overseas visitor spend in the Highlands, compared to 6% across Scotland as a whole. It is another of the UK’s Top 3 inbound markets. The French like scenic natural beauty and wildlife spotting in the Highlands also appeals to them. They also enjoy shopping. French visitors tend to stay in mid-range accommodation with en-suite facilities. Almost a third of French visitor to the UK travel as part of a tour group.

In summary, we recommend that the Wester Ross Tourism Development Strategy should focus on developing and promoting products and services that meet the requirements and expectations of five key market segments.

- Local Residents within 2 Hours Drive Time
- UK Adventure Seekers
- UK Natural Advocates
- German Visitors
- French Visitors

We suggest that these are the market segments that offer the greatest potential for year-round business growth across all sectors of the local tourism industry.

However, we do recommend that the relevance of key target markets should be kept under review on an on-going basis to ensure new market opportunities are not missed. For example, the introduction of new routes into Inverness Airport may open up new opportunities that Wester Ross would be foolish to ignore.

13. **FOUNDATIONS**

This section of the Tourism Development Strategy considers the current barriers or inhibitors to growing tourism in the area and the key strengths and opportunities to increase the value of tourism throughout Wester Ross.

A section on foundations normally includes discussion of the strategic context within which a Tourism Development Strategy will operate. However, we have already discussed this in section 5 of this report and will not repeat ourselves here.

13.1. Current Barriers and Inhibitors

Our surveys and consultations have identified the following as the main barriers to the growth of tourism in Wester Ross.

- **Lack of Collaboration** where scattered and fragmented communities and businesses have a limited culture of working together and tend to do their own thing.
- **Seasonality** where a significant proportion of operators open for limited periods of the year or reduce opening hours outside the short main season. This restricts potential to both grow off-season business and recruit and retain skilled staff. The latter barrier is exacerbated by a lack of affordable housing for key staff.
- **Transport** where visitors can perceive travel distances and costs to be high and there is limited public transport provision both into and throughout the area.
- **Limited Human Heritage Product** to cater for widespread visitor interest in history and heritage. Wester Ross lacks iconic buildings, sites and monuments to complement its world class natural heritage.
- **Lack of Local Statistics**, which are essential to making strong business cases for investment in infrastructure or new products and services.
- **Variable Wi-Fi and Broadband Connectivity**, which makes it difficult to meet the 24/7 digital connectivity expectations of many visitors and restricts opportunities for local operators to make more effective use of IT and social media channels.
- **Visitor Information Provision** where a quarter of respondents to the visitor survey cited difficulties in accessing information specific to their areas of interest.

These are all issues that must be addressed to grow tourism in Wester Ross. We will discuss opportunities to do so under the section 15 of this report entitled, “Improving the Customer Journey – Overcoming Barriers and Inhibitors”.

13.2. Key Strengths and Opportunities

The following have been identified as the main strengths of tourism in Wester Ross that offer the greatest opportunities to increase visitor spend in the area.

- **The Natural Environment**, which is unspoilt, uncommercialised and protected through national and international accreditation programmes.
- **Outdoor Activities** where visitors with all levels of experience and expertise can interact with the natural environment on land and sea.
- **Wildlife Watching** with numerous high quality facilities to view rare and spectacular wildlife on land, on water and in the air.
- **Marine Tourism** where a large and spectacular coastline offers quality opportunities to enjoy activities such as wildlife watching, sailing, kayaking, boat trips and cruising.
- **Itineraries & Routes** where visitors can explore the area through nationally and internationally recognised routes such as the Kyle of Lochalsh Railway, the Ullapool – Stornoway ferry, the Bealach Na Ba, and the North Coast 500.
- **Events** where there is potential to build upon the existing local events portfolio, particularly extreme sporting events and Ullapool's cultural events.
- **Food & Drink** where there is a growing infrastructure of distinctive local producers and a strong base of award winning food and drink providers.
- **Product Clusters** where there is a range of facilities and services in all parts of Wester Ross with particularly strong clusters in the three largest villages.

In the next section of this report we will outline recommendations on how each of these opportunities can be sustainably developed.

14. TURNING STRENGTHS AND OPPORTUNITIES INTO EXPERIENCES

In this section of this report we outline a significant number of initiatives that could potentially increase the value of tourism in Wester Ross. However, we recognise that local groups and agencies are very unlikely to have adequate capacity and resources to implement all of them at once. Therefore, later in section 17 we will identify a smaller number of key priorities that could be taken forward initially.

14.1. The Natural Environment

The quality of the area's scenery and landscapes appears to be the main reason why the majority of visitors come to Wester Ross. An unspoiled and uncommercialised environment is a fragile resource that needs to be managed and protected, particularly if additional visitors are attracted to it. We recommend the following initiatives in which local business and tourism groups could play a lead or supporting role.

14.1.1. Promotion of External Accreditations of the Quality of the Local Natural Environment

Enhanced promotion of external accreditations and endorsements such as the largest National Scenic Area in Scotland, the first National Nature Reserve in the UK, and the Most Northerly Site of the National Tree Collection of Scotland would raise awareness of the environmental qualities of Wester Ross and enable the area to position itself more positively against competitive destinations such as National Parks.

Local business and community groups should be encouraged and supported to collaborate on compiling a database of all independently accredited areas of scenic and environmental importance in Wester Ross and local websites – organisations and individual businesses - should be encouraged and supported to promote such accreditations online. Promotion should also highlight the importance of responsible visitor behaviour in the natural environment.

Visit Wester Ross could lead the way on this initiative by adding such endorsements to relevant sections of the www.visitwester-ross.com website.

14.1.2. Supporting New Initiatives

We recommend that local business and community groups should play an advocacy role by proactively supporting new initiatives that will enhance protection and awareness of the local

natural environment. Such new initiatives would include the Wester Ross Biosphere Reserve application, the enhancement of facilities at Inverewe Gardens and the development of enhanced interpretation and orientation facilities within the National Scenic Area.

Visit Wester Ross could play a lead role in liaising with initiative sponsors to stimulate and coordinate relevant support and lobbying where appropriate.

We also recommend that Visit Wester Ross and partner organisations collaborate to raise awareness and understanding of new initiatives among local tourism operators, perhaps through workshops, members meetings and familiarisation visits to relevant locations.

14.1.3. Compiling Top Ten Databases of Local Scenic and Landscape Highlights

We recommend that Visit Wester Ross and partners collaborate on compiling databases of the Top 10 natural highlights of Wester Ross. These could include the: Top 10 Beaches; Top 10 Mountains; Top 10 Lochs; Top 10 Forests etc. These databases should be agreed through discussion between local groups and the listings should be made available to local tourism operators in a format that enables them to add them to their own websites.

14.1.4. Advocating a Scenic Routes Initiative in Wester Ross

The Scottish Scenic Routes initiative was launched by the Scottish Government in 2013 and aims to enhance the visitor experience of Scotland's landscape by creating innovatively designed viewpoints in selected locations in areas of outstanding scenery. A first pilot project has been developed in Loch Lomond & The Trossachs National Park and a second pilot has been approved for Cairngorms National Park and Loch Ness. Projects are funded by a mix of public sector organisations.

We understand that further projects are envisaged and that there may be a bidding process to secure funding. We recommend that Visit Wester Ross and partners collaborate to develop a strong advocacy case for implementing a scenic routes initiative in Wester Ross. Further details of the Scenic Routes Initiative can be found at www.creatingplacescotland.org/2014-01-24/scottish-scenic-routes-initiative.

It should be noted that 2016 will be the national Year of Innovation, Architecture and Design when such an initiative may generate additional media coverage. If it is not possible to implement an initiative in Wester Ross during 2016, there may be scope to advocate it as a later legacy project that builds on and reinforces the national focus year.

14.2. ***Outdoor Activities***

Outdoor activities are the main mechanism through which visitors engage with and enjoy the natural environment. Wester Ross can offer a wide range of facilities for outdoor activities - walking in particular – that can appeal to both committed and novice activity markets. We recommend the following initiatives to increase visitor awareness and enjoyment of activities.

14.2.1. *Local Walks Leaflets*

Highland Council's Access Officer for Ross & Cromarty is currently undertaking a review of the core path network in Wester Ross. He has worked with a small number of community groups to produce local walks leaflets and is keen to expand the series of leaflets to include additional communities. We recommend encouraging and supporting local groups to work with the Access Officer to produce walks leaflets for all the main communities in Wester Ross. The aim should be to develop a suite of leaflets that cover the whole area and are available in local outlets in printed format and can be downloaded from local websites as PDFs.

Visit Wester Ross and partner organisations could assist this initiative by coordinating liaison between different communities and Highland Council and working with others to secure funding support for print design and production costs.

Local groups should also be encouraged to work with the Access Officer to identify and action opportunities to enhance signage and waymarking of walking routes where required, particularly walks that are likely to appeal to less experienced walkers seeking low level routes.

14.2.2. *Cycling & Mountain Biking*

Wester Ross has no formal mountain biking (MTB) facilities, although a number of routes, primarily on footpaths, are highlighted on MTB enthusiast websites and online forums. Wester Ross currently hosts a number of annual, large scale on-road cycling sportive events that are organised by national event organisers.

Research indicates that 11 million people in the UK own mountain bikes and the number of MTB trips taken in Scotland increased by over 7% between 2010 and 2013. Over 3 million bikes were sold in the UK in 2013, with road bikes outselling mountain bikes for the first time in over a decade on the back of the popularity and high profile of sportsmen such as Bradley Wiggins and Chris Frome. There is evidence that experienced and committed mountain bikers are

increasingly moving away from formal trail centres to wilder “wilderness” routes that offer new and more demanding challenges.

We recommend initiating a project to review cycling websites and on-line forums to identify which local routes are most favoured by MTB and road cyclists and can be more actively promoted to cycling markets without conflicting with other users. As part of this project, we also recommend raising awareness among local tourism operators of the types of facilities and services that MTB and cycling markets require – overnight storage of bikes, hoses to wash down bikes, workshops/garages to work on bikes etc. This could perhaps be done through workshops or email communications to members of local business associations.

We suggest the Tweed Valley Mountain Bike Hospitality Scheme may provide a model for working with tourism operators to provide enhanced facilities for mountain and road cyclists. Information can be accessed at www.visittweedvalley.co.uk/mountain-biking-group-members.

14.2.3. *Collaboration and Packaging*

At present, there is limited evidence of outdoor activity operators collaborating with other tourism operators to offer easily accessed packages to visitors. While most local accommodation providers mention examples of outdoor activities on their promotional materials, only a minority go the extra yard and provide links to or contact details of activity operators. Even fewer offer activity packages as optional bolt on elements to a visitor’s stay.

We recommend that Visit Wester Ross and partner organisations work with activity operators to develop additional day or multi day offers that can be promoted and booked through accommodation providers as add-on elements to an accommodation booking. As part of this initiative, we also recommend seeking to develop multi-activity offers that provide visitors with opportunities to enjoy a range of outdoor activities over 2, 3 or 5 days as part of an accommodation/activities package.

We assume that activity operators already collaborate informally to refer customers to each other. We suggest they could increase their business by moving from reactive referral in response to enquiries to proactive collaboration through more formal joint packaging that stimulates additional enquiries.

14.3. ***Wildlife Watching***

Wildlife is identified as a significant motivation to visit Wester Ross in both the visitor and business survey and the stakeholder consultations. The area can boast an extensive range of wildlife on land, in the sea and in the air, including the so-called “Scottish Big Five” – eagles, red squirrels, red deer, otters and seals – to which can be added other iconic species such as whales, dolphins and puffins. We recommend the following initiatives to enhance visitor awareness and enjoyment of local wildlife.

14.3.1. *Viewpoints*

We recommend that Visit Wester Ross and partner organisations collaborate on identifying and promoting key viewpoints and sites at which visitors are most likely to see different species of wildlife. Once a small number of prime locations has been agreed, we recommend carrying out a review in partnership with landowners and public agencies to determine how they can be enhanced in terms of visitor facilities and visitor management without disrupting the wildlife.

14.3.2. *Wildlife Calendar*

We recommend that Visit Wester Ross and local groups collaborate on drawing up a calendar of the best times of year to see different species of wildlife. This should be promoted on local websites and made available to accommodation providers in a downloadable format that enables them to include it on their own promotional materials and develop shoulder and off season offers built around wildlife watching.

14.3.3. *Marine Wildlife Collaboration*

There are a significant number of marine wildlife operators running boat trips out of Gairloch, Loch Torridon, Ullapool and elsewhere in Wester Ross. Both businesses and stakeholders identified marine wildlife as a particular attraction that brings large numbers of visitors into the area. However, many also commented on a perceived unwillingness of boat operators to collaborate and work together, particularly in Gairloch.

We recommend that Visit Wester Ross and partners work with marine wildlife operators to develop joint promotional campaigns that highlight the complementary diversity of wildlife spotting opportunities they offer. Such collaboration is essential to raising awareness of the critical mass of marine wildlife products on offer in Wester Ross and positioning the area as one of the foremost marine wildlife watching centres in the UK.

A first stage may be to simply draw up an information sheet detailing the different marine wildlife offers that are available locally and circulating it to businesses in other tourism sectors, so they can provide this information to their customers. A second stage may be to undertake joint promotional campaigns in neighbouring tourism destinations such as Inverness, Loch Ness and Skye to draw day visitors from them to Wester Ross.

14.3.4. *Wildlife Festival*

We recommend that Visit Wester Ross and partners liaise with wildlife tourism operators to gauge potential to develop an annual Wester Ross Wildlife Festival event that acts as a showcase of what the area can offer. Such an event could cover all types of local wildlife or could focus on one iconic species such as whales, eagles or red deer when they are most visible and most active.

In a perfect world, such a festival would be a shoulder season event that stimulates additional visits outwith the main season and provides accommodation providers with opportunities to promote packages around it. A festival could incorporate tours, guided walks, lectures, films and a variety of complementary entertainment to enhance and diversify the visitor experience.

This event could be an effective mechanism for bringing existing products together to collaborate on promoting the large critical mass of wildlife watching opportunities Wester Ross can offer and could help to position the area as a first choice Scottish destination for wildlife watching. There may be potential to secure funding support from sources such as the EventScotland National Events Programme.

14.4. ***Marine Tourism***

Wester Ross' extensive coastline differentiates it from many other Highland destinations such as the Cairngorms, Loch Ness and Fort William. A number of stakeholders commented on the coastline currently being an under-utilised tourism resource that could be sustainably developed. We agree and recommend the following initiatives

14.4.1. *Sailing*

There has been significant investment in sailing facilities such as marinas and pontoons in more southerly parts of the west coast of Scotland in recent years. There is significant anecdotal evidence of increasing numbers of yachts venturing further up the west coast, perhaps on voyages to the Northern Isles which have very well developed facilities for sailing markets.

Wester Ross currently has fairly limited formal facilities for visiting yachts with only Sheildaig, Badachro, Gairloch and Ullapool listed on sailing websites. All of these locations have very limited facilities - 2 moorings in the case of Badachro and 8 moorings in Ullapool.

A number of stakeholders commented on potential to enhance facilities for sailing markets in Wester Ross and to develop collaborative promotional campaigns about sailing in the area. We recommend that Visit Wester Ross and partner organisations work together to proactively advocate investment in new product development and marketing of sailing in the area.

As a first stage we suggest looking at ways to enhance tourism operators' awareness of the needs and expectations of visiting yachts and opportunities to provide them with services such as car hire, food and drink deliveries, showers, repair services etc.

14.4.2. *Cruise Markets*

Cruise ships represent one of the fastest growing tourism sectors internationally. Over 2 million Britons take a cruise holiday each year and the number of round-Britain cruises has been growing by around 10% per annum.

Ullapool is a member of the national Cruise Scotland consortium and can accommodate cruise ships of up to 50,000 tonnes and 1,800 passengers. It has aspirations to grow its cruise business.

Both Gairloch and Inverewe have attracted smaller, specialist cruise ships on an occasional basis and the Lochcarron area has attracted some business from cruise ships visiting Kyle of Lochalsh and Plockton.

We recommend that Visit Wester Ross and partners initially work with Ullapool Harbour Trust to develop a range of onshore excursions that spread the benefits of cruise passenger business throughout the area as widely as possible. This could be done by working with local attractions and transport operators to develop itineraries that keep a greater proportion of passengers in Wester Ross while providing them with memorable experiences.

In addition, we recommend that Visit Wester Ross and partners act as advocates for attracting additional cruise ships into the area in order to support the promotional activities of Ullapool Harbour Trust and ensure that local operators deliver quality services and experiences to cruise markets.

14.4.3. *Marine Transport*

We have been advised that there was previously a ferry service from Gairloch to Portree on Skye, which we understand was popular but was discontinued due to technical reasons to do with the boat being used. .

Building on the comments of a number of stakeholders, we wonder if there is potential to work with existing boat operators to develop enhanced excursion and public transport services on water to compensate to some extent for the paucity of public transport on land. Examples could include Ullapool to Achiltibuie as an add-on to Summer Isles excursions; Gairloch to Harris as an add-on to excursions to the Shiant islands; a Gairloch – Diabaig – Shieldaig service for walkers; and a Lochcarron – Plockton service to bring visitors into the area; as well as a renewed Gairloch – Portree service.

We recommend that Visit Wester Ross and partners liaise with boat trip operators to gauge their interest in providing such services and their views on their potential viability. If responses are positive, we recommend working with local agencies to develop business cases that demonstrate the commercial viability of such services, perhaps after some initial financial underwriting

14.5. *Itineraries and Routes*

Wester Ross has a number of nationally and internationally recognised tourist routes running through it, which should offer potential to attract more visitors into the area. We recommend the following initiatives.

14.5.1. *North Coast 500*

This new 500 mile long circular road route along the north east, north and north west coasts of the Highlands starts and finishes in Inverness and has attracted a great deal of media attention since it was launched earlier in 2015. A number of local businesses and stakeholders identified that they have already seen additional customers as a result of it.

The route was conceived and is coordinated by North Highland Initiative who have well developed plans for year-round marketing campaigns, a route app, route signage and interpretation, and consumer and business membership schemes.

Given the high level of initial interest in this route and the fact that a very significant proportion of it runs through and links communities in Wester Ross, we strongly recommend that Visit Wester Ross and partners work closely with North Highland Initiative to support and add value to their activities, by firstly working with local businesses to ensure they are knowledgeable about and actively support and promote the route, and secondly advocating investment in relation to the route.

We also understand that North Highland Initiative are supportive of other shorter, more localised routes being developed to link into North Coast 500. We recommend that Visit Wester Ross and partners proactively collaborate to help develop such routes as a matter of priority. Examples could include: the proposed Arctic Convoy Trail around Loch Ewe; the Lochinver – Achiltibuie – Ullapool route; Laide to Mellon Udrigle beach; Gairloch to Redpoint beach; Torridon to Diabaig; and Strathcarron to Attadale and Eilean Donan

We consider the North Coast 500 to be one of the most positive opportunities to grow tourism in Wester Ross and cannot recommend too strongly that local organisations and businesses embrace and work with it to derive the greatest possible benefit from it.

14.5.2. Kyle of Lochalsh Railway

Recognised as one of the great scenic rail journeys of the world, the railway line from Dingwall to Kyle of Lochalsh runs through Wester Ross for much of its journey. However, it is questionable how much tourism benefit the area derives from the line as most visitors using it travel on to the end destination at Kyle.

There are two main railheads for Wester Ross on the line at Achnasheen and Strathcarron, but little onward public transport from either of them into other parts of the area.

We recommend that Visit Wester Ross and partners liaise with ScotRail and local transport operators to assess interest and potential to develop integrated day excursion tickets to attractions in Wester Ross using the railway.

These could include day excursions incorporating: rail travel to Achnasheen with onward travel to Beinn Eighe Visitor Centre, Loch Maree and Inverewe Gardens; rail travel to Achnasheen and

onward travel to Gairloch for marine wildlife watching trips; rail travel to Strathcarron and onward travel to Lochcarron Weavers and Applecross via the Bealach Na Ba; and rail travel to Strathcarron with onward travel to Attadale Gardens and Eilean Donan Castle.

From discussions with the new ScotRail franchise holder in relation to other parts of the country, we understand they are open to proposals for integrated ticketing with visitor attractions and other complementary modes of transport. The Kyle line is probably currently an under-utilised tourism resource for Wester Ross. Developing integrated ticketing programmes could be an effective way to increase its value to local tourism.

14.5.3. *South West Ross Arts & Eats Trail*

This imaginative initiative was launched by local businesses in South West Ross and links over 30 businesses from Attadale in the south to Diabaig in the north. It is a collaborative promotion between businesses in two sectors that are particularly strong in Wester Ross and has the wholehearted support of Lochcarron & District Business Association, with whom it shares many members.

We recommend that all local groups and local businesses actively support this initiative by highlighting it in their own promotional materials. We also recommend that Visit Wester Ross and partners liaise with the Trail coordinators about the potential to extend it further north into other parts of the area, and recommend that all local groups act as advocates for the Trail to help it obtain funding support that will facilitate a wider promotional reach.

We consider the Arts & Eats Trail to be an excellent example of the types of themed routes and itineraries that could be developed to link into and add value to North Coast 500.

14.5.4. *Bealach Na Ba*

The Bealach Na Ba route to Applecross is probably the most iconic stretch of road in Wester Ross and possibly the whole of the North Coast 500, given it has the greatest ascent of any road climb in the UK. While the route will be actively promoted through North Coast 500 and businesses and community groups in Applecross, there may be potential for further promotion, particularly to day visitors from neighbouring areas.

We recommend that Visit Wester Ross and partners liaise with the Applecross community to gauge the potential for enhanced online promotion of the route and perhaps production of a leaflet or app dedicated to it that highlights its traditional use by drivers, the story of the building

of the road, the local topography and points of interest and viewpoints along the route. The aim should be to position the Bealach to visitors such as Adventure Seekers as a must-do and aspirational element of any visit to the West Highlands.

We have been advised of local concerns about the maintenance of the road and, in particular, the deteriorating quality of passing places on it. We recommend that Visit Wester Ross and partners act as advocates for enhancing budgets allocated to maintaining the road, particularly given its iconic international status.

14.5.5. *Ullapool - Stornoway Ferry*

The Calmac ferry service from Ullapool to Stornoway carries over 220,000 passengers per annum. As with the Kyle line, it is perhaps questionable how many of them do anything more than pass straight through Wester Ross, or are aware of the things to do and see on or close to the A835 artery route on which they travel and other routes that run off it.

We recommend that Visit Wester Ross and partners investigate the potential to undertake collaborative promotions of Wester Ross on the ferry and at both ferry terminals. Ferry passengers are a large market who are already in the area. They are an easy-to-reach market on the doorstep of local tourism operators and visitors who choose to travel to the Outer Hebrides are likely to find much of interest in Wester Ross.

We note that Calmac have supported on-board promotions of local food and drink and culture on a number of its routes and suggest there may be opportunities for local businesses to work together to promote different aspects of Wester Ross to visitors using the ferry service.

We recognise that such promotions may not have an immediate impact as many visitors will have planned their itineraries in advance, but there may be potential to increase their awareness of what Wester Ross has to offer as a visitor destination and to raise it up their list of places to visit on subsequent visits. If nothing else, such promotions may make them more curious to find out more about the area.

14.6. **Events**

Events are a proven means of attracting additional visitors to a destination as they create new motivations to visit and can appeal to new niche markets. Wester Ross already has a strong

portfolio of annual events of certain types and we recommend the following initiatives to grow tourism further through event development and promotion.

14.6.1. *Extreme Sports Events*

Wester Ross hosts a number of annual extreme sports events that appeal to committed enthusiasts and others wishing to stretch themselves. These include; the Celtman Extreme Scottish Triathlon; the Bealach Mor, Bealach Beag and Ullapool cycling sportives; and the Great Wilderness Challenge long distance charity walk/run.

We recommend that Visit Wester Ross and partners liaise with the organisers of these events to discuss: how local businesses can work together to enhance the visitor experience of participants and spectators; the potential to extend the length of stay of participants and spectators; and opportunities to develop ancillary or warm up events in the area that prepare participants for the challenges ahead. We would stress that discussions should emphasis the supporting and facilitating role of local groups rather than suggest that they get actively involved in event organisation.

We also recommend liaising with event organisers throughout the UK to identify opportunities to attract new extreme sports events to the area, building on the success and high participant numbers of the existing events.

14.6.2. *Cultural Events*

Ullapool has developed a strong portfolio of high profile annual cultural events like the Loopallu music festival, the Ullapool Book Festival and Ullapool Guitar Festival.

We recommend that Visit Wester Ross and partners liaise with the organisers of these events to discuss how local businesses can work together to enhance the experience of attendees and the potential to extend the length of the events and expand them into other parts of Wester Ross. Again, we would stress that discussions should emphasis the supporting and facilitating role of local groups rather than suggest that they get actively involved in event organisation.

We also recommend that local groups should act as advocates for these events in order to support any applications they may make to other bodies for funding or logistical support.

14.6.3. *Arts & Crafts*

We note the considerable number of regular craft related markets that are held throughout Wester Ross at certain times of year. We are aware of regular craft and local produce markets being held in Aultbea, Elphin, Gairloch, Lochcarron. Poolewe, Torridon and Ullapool.

Given the interest in local crafts markets and the strength of the arts and crafts sector in Wester Ross, we recommend that Visit Wester Ross and partners advocate and support the creation of an annual Wester Ross Arts & Crafts Festival to showcase local artists and craftworkers. This could be a shoulder season, multi-venue event incorporating exhibitions of work, craft classes, talks by artists and craftworkers, and doors open visits to studios and workshops.

In addition, we recommend investigating opportunities to organise exhibitions of local arts and crafts in other parts of Scotland to both raise awareness of local work and promote the area as a place to visit. Such external exhibitions could perhaps be linked to the development of a Wester Ross arts and crafts brand similar to that which is used in Orkney.

Once again, we do not suggest that Visit Wester Ross and partners necessarily get involved in the hands on organisation of such a festival and external exhibitions. However, they may have a role to play in advocating and lobbying for funding support for such activity in order to commission event organisers.

14.6.4. National and Regional Events

Finally, we recommend that Visit Wester Ross and partners proactively encourage local operators and groups to link into and get involved in annual national and regional events such as Scottish Food & Drink Fortnight, Scottish Archaeology Month, Feis Rois and the Blas Festival, as well as the forthcoming National Focus Years.

Active local participation in such events will benefit the whole area by helping to position it as an interesting place to visit for a variety of niche markets. The larger promotional pull of national and regional events will help to raise the profile of Wester Ross as a visitor destination and will give it stronger tourism voice at national and regional level.

We also suggest that Visit Wester Ross and partners could facilitate collaboration between local operators on joint applications for funding support linked to national and regional events. In simple terms, one larger collaborative funding application may appeal more to funding sources such as EventScotland than a series of smaller applications from individual operators and organisations.

14.7. **Food & Drink**

Both businesses responding to our survey and stakeholders had mixed opinions about the quality of the food and drink offer in Wester Ross. Overall, there was a prevalent view that it had improved in recent years, but remains variable and in need of further improvement. Therefore, we recommend the following initiatives to strengthen the area's food and drink offer.

14.7.1. External Accreditation Schemes

We recommend that Visit Wester Ross and partners encourage and promote membership of national food and drink accreditation and membership schemes like Taste our Best, Scotland Food and Drink, Quality Meat Scotland and Seafood Scotland.

Such schemes provide independent endorsements of the quality of food and drink and can apply both to food producers and catering outlets using accredited produce. Membership of these schemes offers additional promotional opportunities to individual operators and helps to position Wester Ross as a quality food and drink destination.

14.7.2. Using Local Produce

There is growing public interest in the provenance of food and drink and VisitScotland research shows that sampling local produce is the second most popular visitor activity in Scotland (after general sightseeing).

Given this, we recommend that Visit Wester Ross and partners act as advocates for use of local produce and encourage and support tourism operators to include and promote quality local produce on their menus. This is applicable to all catering operators from the highest quality hotels and restaurants to the smallest B&Bs and cafes, as well as self catering operators who could include local produce in welcome packs in their properties along with information about local producers.

We suggest there may be scope to organise local sourcing workshops and Meet the Producer events, perhaps in partnership with national and regional food tourism initiatives such as Experiencing Scotland and Lunch & Learn

14.7.3. Opening Hours

A number of visitor and business survey respondents raised concerns about Wester Ross having a limited number of quality eating establishments out of season when many local restaurants and cafes are closed. We were strangely touched by one response to the visitor survey that included a lengthy and detailed exposition about a struggle to find somewhere to have a cup of tea in the area in early February.

When travelling in the area ourselves, we also noted that, even in peak season, many businesses offer food and drink for very restricted hours. We wondered how overseas visitors travelling in the numerous Italian camper vans and Spanish coaches that we saw on the roads were coping with having to eat by 8pm each evening.

We recommend that Visit Wester Ross and partners advocate and encourage a more flexible approach by local businesses to the hours when they serve food and drink. This could perhaps be achieved on a collaborative basis where catering outlets in a community take turns to stay open later on different nights of the week and agree a schedule where at least one of them is open each day of the week outwith the main season.

We appreciate that businesses operate their opening hours for bottom line, commercial reasons but, if there is not enough business to sustain longer opening hours across three or four establishments, could there be enough to sustain longer opening in one if they took it in turns to be that business?

14.7.4. Food & Drink Festival

As part of the drive to enhance the area's events portfolio, we recommend that Visit Wester Ross and partners liaise with local producers and catering operators to evaluate the potential to organise an annual food and drink festival in the shoulder season.

If there is sufficient interest, this could be themed around a specific local product such as seafood or venison and could involve as many local outlets as possible showcasing their use of that particular produce, perhaps through promoting new added value and premium priced dishes for a limited period only.

There are many existing food and drink festivals across the UK that can provide ideas that could be copied in Wester Ross. As an example, we note that BBC Radio 4 is currently broadcasting a series called “The Town is the Menu” in which a chef develops a new signature dish for different places that uses local produce and reflects its food heritage. Perhaps a competition for local chefs and the general public to develop a signature dish for Wester Ross could be a lead element of a local food and drink festival?

14.8. Product Clusters

Finally for this section of the report, we were very struck by the manner in which the product audit that we carried out highlighted the spread of tourism products and services across all parts of Wester Ross. We also noted the differing opinions among stakeholders about whether Wester Ross should be promoted as the main local identity or the names of individual towns and villages should be given greater prominence in tourism promotions.

We are somewhat nervous about the latter approach as it may exacerbate already prevalent issues of fragmentation and a lack of collaboration across different communities. However, we do recognise the potential to promote the spread of visitor facilities across Wester Ross in order to offer a stronger critical mass of products and encourage touring visitors to stay in more than one village in the area. This might be more easily achieved by highlighting the diversity and distinctive natures of local communities.

We recommend that this dichotomy could be addressed by developing a stronger tourism brand for Wester Ross that is flexible enough to be adopted by individual communities in the area. This would give an umbrella brand for the whole area that individual communities would link into and reinforce in a collaborative manner.

Branding is a subjective subject and as much an art as a science. However, we suggest that the existing Visit Wester Ross brand device depicting mountains, sky and water is a strong representation of the area that could apply to each community within it. It would work equally well with the name of the whole area or the name of individual communities under it.

We recommend that Visit Wester Ross and partners offer this brand device to local business and community organisations to adapt to use for their own villages and areas. It could also be offered to individual businesses to use with their business name. It will be up to each community and each business to decide if they use this brand, but greater use of it would facilitate and support more collaboration between different parts of Wester Ross and would reinforce the

message the brand device conveys about the landscapes and scenery of the area, which we already know are the main draw for visitors.

However, we are less convinced about the current Wester Ross - Live the Highlands” strapline as it struggles to convey a distinctive message about the area’s unique visitor offer or differentiate it fully from other parts of the Highlands. In our view, an area like the Outer Hebrides delivers a stronger message with its “Experience Life on the Edge” strapline.

We recommend that Visit Wester Ross and partners hold a number of focus group workshops to discuss and agree a new strapline to be used with the existing brand device. Again, this should be a strapline that can be used by individual communities and local businesses. We recommend that any new strapline should continue to link into the strong international brand of the Highlands.

14.9. Conclusion

In concluding this section of this report, we would reiterate that we do not anticipate Visit Wester Ross and partner organisations immediately implementing all of the recommendations that we have outlined.

We would emphasise that the Tourism Development Strategy is intended to direct local tourism activities for the next 5 years and to provide a platform for longer term development. We envisage many of our recommendations being addressed at different times during the next five years or maybe even after 2020.

We also expect local groups and organisations to identify the recommendations that they believe are the greatest priorities and which they feel they have the skills and capacity to implement most effectively.

However, later in section 17 of this report we will suggest some initial priorities for consideration.

15. IMPROVING THE CUSTOMER JOURNEY – OVERCOMING BARRIERS AND INHIBITORS

In this section of the report we will make recommendations on ways to minimise the adverse impacts of the existing barriers and inhibitors to tourism growth that we have previously identified in section 13.1.

15.1. *Lack of Collaboration*

In section 14 above, we have made almost 30 recommendations for new initiatives, the overwhelming majority of which are unpinned and most easily delivered through collaboration and partnership working between local business and community groups, individual businesses and local agencies in all parts of Wester Ross.

In our view the best way to encourage collaboration is to support and implement as many tangible opportunities for partnership working as possible. As always, actions will speak louder than words, although we recognise that localised interests may face challenges in agreeing to compromises for the greater good in order to overcome the prevalent culture of fragmentation.

However, we do strongly believe that greater collaboration is fundamental to growing tourism in Wester Ross and continuing to think and operate on a very localised level will severely impede both economic and community development.

15.2. *Seasonality*

Again in section 14 above, we have outlined a significant number of recommendations to extend the visitor season in Wester Ross and reduce issues of seasonality. However, we do recognise that there are other issues outwith the control of Visit Wester Ross and partner organisations that will continue to restrict the development of a truly year round visitor economy.

Foremost amongst these is the lack of affordable accommodation to support the recruitment and retention of key staff. We recommend that Visit Wester Ross and partners work together to advocate strongly for the enhanced provision of affordable housing across the area and gather an evidence base about the specific challenges that tourism operators face as a consequence of inadequate provision.

In addition, we recommend that local operators are encouraged and supported to extend their opening periods, on a localised rota basis if that is more commercially viable. We also

recommend that local business and tourism groups collaborate on highlighting and promoting year-round facilities and services on on-line and social media channels. This could perhaps be done by developing day visit as well as 24, 48 and 72 hour winter itineraries in Wester Ross.

Finally, we recommend that Visit Wester Ross and partners liaise with year-round operators to develop and promote special winter offers through all available online and social media channels. Such offers do not necessarily have to be price led or discounted. They could include added value elements like “winter warmer” menus in local restaurants, a welcome bottle of warming Scottish whisky and complimentary coal or logs in self catering accommodation, umbrellas and rain jackets available to borrow at outdoor facilities, and accommodation operators providing books and DVDs for cosy nights by the fire.

15.3. Transport

Barriers relating to transport are largely infrastructure issues that are beyond the capacity of Visit Wester Ross and partner organisations to address in their own right. However, it is key that all local business and community groups collaborate to create a strong and effective advocacy voice that supports enhanced investment in the area’s transport infrastructure.

Firstly, it is essential to lobby collectively for continued investment in road maintenance and improvement through the area. Priority should be given to lobbying for the remaining single track stretches of the A832 and A890 to be upgraded. This can perhaps be most effectively achieved through working in partnership with local elected representatives at regional and national level. However, lobbying for enhanced maintenance of existing roads is also a priority.

The lack of local public transport is another issue that is likely to seriously restrict the growth of tourism in Wester Ross. We are aware that there have been a number of initiatives to address this in the recent past, most if not all of which have been discontinued for a variety of reasons, although lack of demand is the most commonly cited. We are unclear if a lack of adequate promotion and integration led to this lack of demand.

In section 14, we have recommended initiatives to investigate the potential for local boat trip operators to develop regular sea transport services and for integrated ticketing involving onward road travel to be developed from the Achnasheen and Strathcarron railheads on the Kyle of Lochalsh line. In addition to the latter, we would also recommend looking into the potential to

develop integrated onward services that link into the Inverness – Ullapool express coach service that appears to currently primarily carry ferry bound passengers.

In addition to the above, we recommend that Visit Wester Ross and partners look into opportunities to work with local taxi and mini bus companies to provide and promote onward travel from the main railheads and Ullapool coach terminus. In particular, there may be scope to promote shared taxi services which would reduce the cost to each individual traveller. In addition, there may be potential to promote self drive car hire pick up from railheads and the coach terminus.

In a perfect world, the customer journey (sic) would be improved if they could use one centralised booking contact for such onward travel services. We recommend investigating opportunities to provide such a centralised service, perhaps through one of the visitor information centres in the area.

In addition to public transport to bring visitors into Wester Ross, there is also a need to provide better transport services to move visitors around the area once they are here. Again we suggest that this could be done through working with existing local operators to develop enhanced boat, taxi and minibus services.

We recommend that Visit Wester Ross and partners invite local operators and community and agency representatives to a public transport summit to discuss demand for enhanced services and how they could be delivered through local operators working in partnership. We suggest the aim should be to develop and secure external funding support for a Wester Ross Transport Initiative that grows demand for services and generates additional business for local operators while benefiting both visitors and local residents.

15.4. Limited Human Heritage Product

When analysing the audit of local visitor products and services, we were struck by how little human heritage Wester Ross has to offer, particularly compared to its extensive range of natural heritage.

Research indicates that many visitor market segments view visiting castles, historic houses and historic sites as a particularly enjoyable element of a visit to Scotland. Heritage is an important motivator of visits to Scotland. Unfortunately, Wester Ross has no truly iconic castles, battle

sites and well known historic locations that can match the human heritage product of many other parts of the Highlands. We note that half of the ten most visited attractions in the Highlands are castles or visitor centres associated with historic events.

In order to attempt to address this deficit in Wester Ross' visitor offer, we recommend that Visit Wester Ross and partners act as advocates to support all proposals to enhance museum and heritage centre facilities in the area, particularly the proposals to expand Gairloch Museum and create a new museum telling the story of the World War 2 Arctic Convoys at Loch Ewe.

We would also encourage Visit Wester Ross and partners to proactively support additional collaboration between existing local museums and heritage centres, perhaps through an annual Wester Ross History Festival event that could encompass a number of venues and focus on telling the stories of the people of the area.

We also recommend working with local community groups to identify and develop opportunities to tell and promote interesting local history stories more prominently on on-line channels and social media. Examples could include: the early Christian history of the area; Destitution Road in Dundonnell; the clearances and the "lost" township of Inverlael; the Poolewe to Dingwall Postie Run; and the coming of the railway.

There may also be opportunities to tell visitors more about current social conditions in the area in order to add to the authenticity of their experience. We are thinking of examples like modern day crofting, life without roads on the Scoraig peninsula and the role and contribution of local estates. Such stories could perhaps be told through programmes of guided visits to see interesting and unusual aspects of modern day life in Wester Ross

Finally, we also recommend that Visit Wester Ross and partners collaborate with local groups to identify and action opportunities to develop and promote local heritage walking trails that link listed buildings and important sites in the development of individual local communities. There may also be scope to develop programmes of guided walks around these heritage trails to bring local history more to life.

As with transport, there may be potential for Visit Wester Ross and partners to develop and secure funding support for a Wester Ross Local Heritage Initiative that benefits both visitors and local residents. This could be the type of project that appeals to the Heritage Lottery Fund.

15.5. Local Visitor Statistics

Robust statistical data on the volume and value of tourism and trends in the sector is essential to monitor performance, make informed business decisions and develop compelling cases for investment in visitor infrastructure and facilities. Unfortunately, there appears to be a lack of up to date statistics relating solely to tourism in Wester Ross.

The most recent data of which we are aware is a 2002/03 Wester Ross Tourism Factsheet that was produced by Highlands and Islands Enterprise. This estimated the value of tourism in the area to be just over £50 million p/a; highlighted the importance of the non-serviced accommodation sector; and stated that average per capita daily visitor spend in the area was well below the Highlands average.

Since then tourism statistics relating to Wester Ross have been available at only a wider regional Highlands level, although some other economic indicators are broken down to sub-regional level. However, even at sub-regional level Wester Ross is not identified as an area in its own right but is included in wider areas such as Lochaber, Skye and Wester Ross.

Consequently, there is only anecdotal information about the size and performance of the local tourism sector. We note that the surprisingly small Wikipedia entry for Wester Ross states,

“Wester Ross is a popular scenic tourism destination, although the level of this has declined considerably since the 1970s”.

We do not know on what basis this statement has been made or if it reflects prevalent perceptions in the area.

We suggest that it is beyond the capacity and remit of local business and tourism groups to compile detailed volume and value stats on tourism in Wester Ross. However, we do recommend that regional Highland trends are used to give indications of trends in local tourism. We also suggest that Visit Wester Ross and partners conduct regular business barometer surveys through their memberships to collect and collate industry views on local tourism performance and trends and identify any issues and opportunities that are becoming increasingly important.

Such barometer studies can be conducted by email questionnaires to member businesses asking them a small number of questions about business levels and trends every quarter or

every six months. Over time, responses should provide a more localised source of information that can be used to support funding applications and lobbying activities.

15.6. Variable Wi-Fi and Broadband Connectivity

Like transport, digital connectivity is an issue that is beyond the capacity of Visit Wester Ross and partner organisations to address in their own right. However, we suggest that this is a barrier to business growth where local groups can collaborate on gathering evidence of specific local issues that impact on business performance and which can be used to build up an advocacy case for enhanced connectivity.

The Highlands Area Tourism Partnership has identified broadband provision and mobile connectivity as issues on which it will “advocate to ensure the needs of tourism and tourism businesses are recognised in future developments”.

We recommend that Visit Wester Ross and partners can best support and add value to this regional advocacy effort by collecting, collating and sharing hard evidence of connectivity weaknesses and their impacts on tourism at local level. We also suggest that Wester Ross groups will have a role to play in keeping digital connectivity high on the Area Tourism Partnership agenda and lobbying for proactive and tangible Partnership action on this issue.

15.7. Visitor Information Provision

A quarter of respondents to the visitor survey identified difficulties in accessing the pre-arrival information that they sought. The majority of difficulties related to finding specific information on local websites, primarily relating to walks and wildlife.

Once again, this is a barrier that could be most effectively addressed through greater collaboration between local groups, communities and businesses.

In section 14 of this report, we have outlined a number of recommendations to enhance visitor information about Wester Ross. These include developing –

- Databases of different types of key local facilities that can be available online.
- A series of complementary walks leaflets that cover the whole area in printed and downloadable format.

- A wildlife calendar detailing when visitors are most likely to see iconic species.
- Collaborative promotions between marine wildlife operators.

Initiatives such as these should help to provide visitors with clearer, more easily accessed information, particularly if local businesses use the information on their own websites or provide links to it.

However, we also recommend a review of the current www.visitwester-ross.com website to simplify its navigation and perhaps make it less cluttered. The current site looks like it has added new content in a fairly ad hoc and haphazard manner. It would benefit from streamlining its content to give greater prominence to key messages and information about the area.

We also recommend that there is a need to review all local websites to ensure they provide accurate and up to date information. We appreciate that most sites are maintained by volunteers, but we have serious concerns about the accuracy and detail of some of the information contained on them.

We suggest there could perhaps be a collaborative initiative to identify the individuals who manage local websites and work with them to update and refresh their information. In particular, it would be helpful to visitors if they included any new databases of local facilities, local walks leaflets and the proposed wildlife calendar.

As a second stage to such an initiative, we recommend reviewing how all relevant local websites can most effectively link to each other to cross sell different parts of Wester Ross and provide a more comprehensive range of information.

15.8. **Conclusions**

As with section 13 of this report, we do not anticipate Visit Wester Ross and partner organisations immediately addressing all of the barriers and inhibitors to improving the customer journey that we have outlined.

We would emphasise again that the Tourism Development Strategy is intended to direct local tourism activities for the next 5 years. We envisage many of these barriers being addressed at different times during that period. We also expect local groups and organisations to identify the

barriers they feel are the greatest priorities and which they believe they have the skills and capacity to address most effectively.

However, later in this report we will suggest some initial priorities for consideration.

16. BUILDING CAPACITY AND CAPABILITIES

In this section of the report we discuss issues relating to the capacity and capability of local organisations and businesses to address tourism opportunities and challenges. The main issues that we consider worthy of discussion are outlined below.

16.1. Labour & Skills

A skilled and committed labour force is fundamental to success in any industrial or commercial sector. Tourism is no exception.

In addition to lobbying on the issue of affordable housing for key staff which we have outlined previously, we recommend that Visit Wester Ross and partners consider the following initiatives.

- Expanding the existing local programme in Gairloch to attract school leavers into the tourism sector and prepare them for work in it.
- Developing and delivering informal local product knowledge programmes for front of house staff recruited into the area to enable them to enhance the visitor experience through referral and recommendation. There are numerous examples of such programmes elsewhere in Scotland.
- Developing and delivering a regular programme of events and workshops for local operators to inform them of market trends, business opportunities and local initiatives, and to provide skills training in key areas such as social media.
- Advocate and support initiatives to provide Leadership Skills training to community and business leaders.

We suggest a programme as outlined above would help to enhance the skills base of the local industry.

16.2. Quality

Delivery of quality services and products is essential to customer satisfaction that generates repeat visits and recommendations/referrals. Quality can be a subjective concept but we recommend that Visit Wester Ross and partners implement the following initiatives to encourage and promote quality delivery in the area.

- Ensure all local operators meet all relevant legislative requirements. We recommend working with relevant authorities to identify such requirements across all sectors and requiring operators to provide proof that they meet them before they participate in any local initiatives (including listings on local websites).
- Encourage and support local operators to join appropriate nationally recognised accreditation schemes and to apply for regional and national awards.
- Use websites and social media to actively promote awards and recognition won by local operators.
- Share local and national best practice case studies with local operators through email communications and events.
- Set up and promote quality customer service recognition schemes for tourism staff where visitors are encouraged to nominate individuals who exceeded their service expectations.

There are many examples of such initiatives already being delivered in other parts of the UK that could provide models that could be adopted in Wester Ross.

16.3. Collaboration

The importance of collaboration and partnership working has been the key thread running through all of this report. Collaboration is fundamental to developing tourism in Wester Ross.

We recommend the following initiatives for Visit Wester Ross and partners, which are additional to those we have already made regarding collaboration.

- Organise and promote an annual Wester Ross Tourism Conference to discuss area wide issues and opportunities and share best practice case studies from around the world. This could perhaps be timed to link into Scottish Tourism Week and could incorporate a pre-Easter leaflet exchange between local operators.
- Set up a Wester Ross Tourism Forum that brings representatives of local business and community groups together at least twice a year to agree area priorities and monitor progress on them. This should also provide a forum for exchange of information on new initiatives and issues in each part of the area.
- Investigate industry interest in setting up self-managing local sectoral groups to support collaborative product development, marketing and lobbying and encourage cross-referral. Groups could include food and drink producers; hostel and bunkhouse operators; marine tourism operators and others.
- Identify and action mutually beneficial opportunities to develop collaborations with tourism groups in neighbouring areas such as North Highlands, Skye and Easter Ross. This could perhaps best be done through working with the Highlands Area Tourism Partnership and the North Coast 500 initiative.

16.4. Capacity

We note that most local groups and organisations rely primarily on volunteer input and support to deliver their activities and projects. Only a minority have dedicated and paid staff resources.

We are advised that there is great competition for the limited local volunteer resource, which is reducing due to fatigue and dis-satisfaction with the growing levels of bureaucracy and red tape with which volunteers increasingly have to work.

It appears to us that a number of local groups and organisations are struggling to continue to operate with a smaller number of volunteers and that some would effectively cease to exist if one or two individuals were to withdraw their time and effort.

We note that the two communities in Wester Ross that are perceived to have been most ambitious and active in developing new visitor facilities and services are Achiltibuie and Applecross, both of which have employed dedicated Project Development Officers who have been supported by strong and active community leaders. We suggest it is maybe no

coincidence that Achiltibuie and Applecross are probably the two most remote and, therefore, self reliant communities in the area.

However, we also note the wide range of economic and community development activities that GALE have been able to implement through having a dedicated staffing resource and the way in which Visit Wester Ross has been able to develop its activities across the whole area and its liaison with national and regional agencies through having access to a part-time staff resource who works on a self employed basis.

Quite simply, we believe there is little scope to grow tourism in Wester Ross to any significant extent by simply relying on the existing volunteer resource to give more time and commitment to new initiatives. In our view, increased staffing resources are essential to delivering a new Tourism Development Strategy with any genuine ambition and impact.

In a perfect world we would recommend seeking public sector agency support to fund a number of coordinated, part time Tourism Development Officer posts in the area, whose primary role is to encourage and facilitate business and economic development within the tourism sector through collaboration and partnership working.

We suggest that part time posts based in Gairloch, Lochcarron and Ullapool may actually help to address fragmentation rather than exacerbate it by giving each part of Wester Ross equal representation within an area-wide initiative. For better or for worse, businesses and organisations in each location are more likely to respond positively to a local staff resource than one located elsewhere in Wester Ross. That appears to be the prevalent local culture. It will take some time to change it.

Having a number of part-time local posts may also increase operational flexibility and capacity by involving more local communities more directly in the tourist development strategy. Each part time officer could lead on and coordinate the delivery of different elements of the strategy.

Rather than set up a new membership body, existing local groups and organisations could be encouraged to commit a proportion of their membership income to their local post and public sector funding could be for a set period during which the post holders are set fundraising targets to make their positions sustainably self financing.

However, we recognise that this funding model has proved largely ineffective in many of the Destination Management Organisations that have been set up across Scotland and which have

not managed to achieve sustainable self funding, but continue to operate primarily through on-going direct or indirect public sector support.

Recognising this, we recommend it is imperative that all new initiatives that seek external funding support include an element of staff costs to facilitate their delivery. Such project by project funding of staff resources is not ideal, but it may be the most practical way to increase the capacity of Wester Ross to deliver new tourism initiatives if public agencies are unable to core fund part time posts.

One way or another, the issues of capacity and a diminishing volunteer base must be addressed if this Tourism Development Strategy is to be implemented in full or in part over the next five years.

17. RECOMMENDED PRIORITIES

In this Tourism Development Strategy we have outlined a large number of recommended actions to turn strengths and opportunities into experiences and overcome barriers and inhibitors to improving the customer journey.

As previously stated, we recognise that Visit Wester Ross and partners will not have the capacity and resources to progress all of these recommended actions immediately, although we hope they will be able to implement at least a majority of them over the five year timespan of the strategy.

We suggest it is primarily up to Visit Wester Ross and its partners to agree which recommendations they want to pick up and run with in the short term. However, we strongly recommend that initial priority should be given to recommendations that –

- Increase local capacity and capabilities.
- Encourage and support collaboration across the area.
- Develop a strong advocacy voice for the local tourism industry.

Below we suggest four initial priority projects for each of the above areas, giving an initial twelve priority projects to take forward in the short term,

17.1. Increasing Local Capacity and Capabilities

Recommendation 15.3: Organise and promote an annual Wester Ross Tourism Conference to link into Scottish Tourism Week and incorporate a leaflet exchange.

Recommendation 15.1: Develop and deliver informal local product knowledge programmes for front of house staff.

Recommendation 14.2: Collate information from local operators to support initiatives to enhance the provision of affordable housing that will assist the recruitment and retention of key staff.

Recommendation 15.4: Secure funding support for the creation of a number of coordinated part time Tourism Development Officer posts across the area.

17.2. Encouraging and Supporting Collaboration Across the Area

Recommendation 13.5.1: Work with North Coast 500 to enhance promotion, signage, interpretation and business engagement with the route and to develop shorter local routes off the 500.

Recommendation 13.2.1: Work with the local Highland Council Access Officer and local groups to develop a suite of complimentary local walks leaflets covering the whole area.

Recommendation 13.3.2: Work with local operators and groups to develop a wildlife calendar that highlights when different species can most easily be seen to the best visitor advantage.

Recommendation 13.3.3: Draw up and circulate an information sheet detailing local marine tourism operators and begin discussions with operators on joint promotional campaigns to position Wester Ross as one of the foremost marine wildlife watching destinations in the UK.

17.3. Developing a Strong Advocacy Voice for the Local Tourism Industry

Recommendation 14.3: Lobby for improvements to the local road infrastructure and public transport provision to enhance access into Wester Ross and facilitate travel around the area.

Recommendation 14.4: Support proposals to create new facilities that will enhance the human heritage offer of the area to complement its natural heritage offer.

Recommendation 14.6: Work with the Highland Area Tourism Partnership to lobby for improvements to wi-fi and broadband connectivity throughout the area and gather an evidence base to support such improvements.

Recommendation 13.4.1: Advocate investment in new product development and marketing of sailing in Wester Ross and support this by raising local business awareness of the expectations and potential benefits of sailing markets.

The twelve recommendations outlined above are priorities that we suggest Visit Wester Ross and partners could progress in the first six to twelve months of the Tourism Development Strategy.

18. **CONCLUSION**

Tourism and Leisure Solutions are grateful for the opportunity to prepare and present this Tourism Development Strategy. We would like to thank everyone who assisted its preparation by responding to surveys and sharing their detailed local knowledge, ideas and suggestions.

In particular, we are indebted to Douglas Gibson of Visit Wester Ross and Stuart MacPherson of Highlands & Islands Enterprise for giving us so much time and support and for facilitating introductions to key local stakeholder contacts.

In our view there is significant potential to increase the volume and value of tourism in Wester Ross in a sustainable manner that conserves and protects its natural assets while delivering high quality visitor experiences.

However, we are firmly of the view that growth in tourism will not be achieved without significantly more collaboration between local businesses, organisations and communities. Wester Ross is an area of small, scattered communities. While each of these communities can offer visitors a varied portfolio of products and services, collaboration is key to developing a greater and more varied critical mass of experiences that can appeal to wider and higher value visitor markets.

In addition, we believe it is unrealistic to expect this Tourism Development Strategy to be delivered solely by local volunteers. Wester Ross has a small population with limited volunteer capacity that is already over stretched and showing signs of fatigue. Enthusiastic and knowledgeable volunteers will need support from dedicated staffing resources to coordinate, drive and implement activities to their optimum level. This is a fundamental requirement.

In conclusion, we hope this Tourism Development Strategy will help to encourage and support collaboration across the whole of Wester Ross and will contribute to the development of a high quality, sustainable tourism industry that benefits local residents, local businesses and local communities.

Douglas Ritchie

Tourism and Leisure Solutions

September 2015

APPENDIX 2 – AUDIT OF WESTER ROSS ORGANISATIONS & VISITOR INFORMATION SOURCES

1. Achiltibuie Tourist Association (www.coigach.com)

Voluntary organisation linked to Coigach Community Development Company that provides information for visitors and promotes local businesses. Has an attractive and comprehensive visitor-facing website with 9 menu options and over 70 business listings. Site includes a PO Box and email address for queries and further information.

2. Applecross Archaeological Society (www.applecrossarchaeology.org)

Local volunteer group linked to Applecross Landscape Partnership Scheme, whose website includes details of local archaeological sites and proposals to create a local Archaeology Trail. Website includes clear contact details for queries and further information.

3. www.applecross.co.uk

Visitor facing website comprising 4 pages covering: Home (listings and links to 19 local businesses); About (limited local information); Events (none listed); and Getting Here. No contact details for queries etc. and it is unclear who set up and manages the site which is copyright of Applecross Peninsula. Comes up first under Applecross on search engines.

4. **Applecross Community Company** (www.applecrosscommunitycompany.org)

Community managed initiative focussing on community development and renewable energy. Company runs the local community owned petrol station. It employs a full time Local Development Officer, funded by HIE, and a part time Administrator. Website includes clear contact details for queries and further information.

5. **Applecross Historical Society** (www.applecrossheritage.org.uk)

Registered charity run by local volunteers. Manage and operate Applecross Heritage Centre and employ a full time Heritage Curator through funding from Applecross Landscape Partnership. Website contains detailed local history and listings of 9 local accommodation providers as well as a contact form to submit queries and information requests.

6. www.applecross.info

Visitor facing website with 7 menu options: The Peninsula; History; Scenery; Things to Do in Applecross; Things to Do near Applecross; Accommodation: and links. Details and listings of 50 tourism operators. No contact details for queries etc. and no indication who set up and manages the site. Comes up second under Applecross on search engines.

7. **Applecross Landscape Partnership** (www.visit-applecross.org)

Partnership of local groups that has 5 key programmes that cover conservation and recording of local heritage, path development and improvements to biodiversity. The Partnership has secured over £2 million in the past 5 years with main funders including Heritage Lottery Fund (£999,000); ERDF (£237,000); Applecross Trust (£208,000) and LEADER (£94,000). Website includes clear contact details and some generic visitor info.

8. **Applecross Trust** (www.applecross.org.uk)

Conservation charity that owns the Applecross Estate and has sourced and invested over £6 million in local projects in recent years. Employs a full time Administrator and HLF Coordinator as well as estate staff. Website contains info on the trust, details of holiday cottages to let on the estate, natural heritage and pdf downloads of leaflets detailing 17 local walks (with listings of 14 local businesses). Site has clear contact details for queries etc.

9. **Applecross Walks & Traditional Crafts Group**

Group mentioned on other Applecross websites. Landscape Partnership site has a page for this group with named contacts for further info. Page talks of organising walks and craft events but it is unclear if this group is still going.

10. www.camusnagaul.com

Essentially a website for an accommodation provider, but contains detailed information about the area as well as links to local businesses and dedicated pages for different local locations that have their own urls. Comes up high in online searches under various locations and has strong visual content.

11. **Coigach & Assynt Living Landscape Partnership** (www.coigach-assynt.org)

Community partnership project that aims to bring environmental and economic benefits to Coigach and Assynt. Scottish Wildlife Trust is a lead partner. Group secured £100,000 of Heritage Lottery Fund development funding in 2013 and recruited 3 project team members, who are employed by SWT, to develop a second stage delivery HLF funding application.

12. **Coigach Community Development Company** (<https://ccdcompany.wordpress.com>)

Has secured £160,000 of funding from the Scottish Land Fund to buy Achiltibuie Smokehouse for the local community and recruit a part time Development Officer to develop the smokehouse as a community resource. Also has a subsidiary company developing a wind turbine project. Website is community facing and some of the information appears to be out of date.

13. www.gairloch.org

Website that comes up in the Top 5 responses to online searches under Gairloch. Looks like a commercial site but it is unclear who set up and manages it and what precisely its purpose is. Incorporates pages on various local locations with some links to accommodation providers. Strong visual content.

14. **Gairloch & Loch Ewe Action Forum (GALE) (www.galeactionforum.co.uk)**

Self-financing community owned and managed charitable development company. Operate a Community Shop at Gairloch VIC. Other key projects include regular community markets and supported volunteering programmes. Employ 1 full-time Manager, 5 part time posts and 2 part time project posts. Website has separate Community and Visitor sections. Visitor section includes info on: Getting Here; Where to Stay; Eating & Drinking; Things to See & Do; and Route Search. It incorporates over 80 business listings.

15. www.hanszell.com/lochcarron

Privately owned and managed website with details of over 100 businesses, groups and initiatives across Wester Ross and generic information on topics such as How to Get to Lochcarron and Public Transport in the Area. Very detailed info, but very, very copy heavy presentation with few visuals.

16. www.lochalsh.co.uk

Website describing itself as the Lochalsh & the Isle of Skye Tourist Guide but containing pages and information on Applecross and Strathcarron. Unclear who set up and maintains the site, but it could be a commercial web design company. Contains a lot of old information and may no longer be maintained.

17. **Lochcarron Community Development Company (www.lochcarroncommunity.com)**

Formally known as Kirkton Woodland & Heritage Group, a charitable company limited by guarantee that aims to undertake projects that deliver economic, social, cultural and environmental sustainability. Run the Smithy Community Hub to generate revenue. This incorporates a Made in Lochcarron shop and gallery run by volunteers. Also organise monthly Producer Markets. Employ a Local Development Officer and 2 "project facilitators". Website incorporates a series of downloadable leaflets about Day Trips in the local area.

18. **Lochcarron & District Business Association (www.lochcarron.org.uk)**

Membership organisation set up to encourage use of local businesses by residents and visitors. Has over 80 members. Website is mainly visitor facing and includes sections on: Destination Lochcarron: Where to Stay/Eat/Shop/Visit; Local Events & News; About Lochcarron; Activities; & a Business Directory. Also produce an annual Lochcarron Out & About Guide that retails at £4.95. Website has clear contact details for queries.

19. www.lochcarron.tv

Website of news and views from around Lochcarron set up and managed by local photographer Alex Ingram. Incorporates over 30 video clips of the area and a series of blog posts (that haven't been updated since 2013). Sites includes a Contact Form for queries.

20. **Sheildaig Community Council** (www.sheildaig.info)

Statutory body who maintain a website with a degree of visitor-facing information and manage a floating pontoon for local and visiting yachts. Also manage an all-weather sports courts available for locals and visitors to book. Website has phone contact details for queries and further information

21. www.stevecarter.com/lt.htm

Visitor facing website about Torridon and Sheildaig developed and maintained by local photographer, Steve Carter. In the Top 5 responses for online searches under Torridon. Very detailed "not for profit" site with extensive information, some of which is downloadable as a pdf. Includes free listings for 45 local accommodation providers. Very strong visually with clear contact details for further information and queries.

22. **Ullapool Community Trust** (www.ullapoolcommunity.org)

Registered charity and member-led community organisation that appears to have secured funding support from HIE, ERDF and LEADER. Key projects include: improving broadband connections; a community right to buy project at Lochbroom Chalet Park; Lael Forest Community Hydro Scheme and Lochbroom Woodfuels (a wholly owned social enterprise). Have also secured funding from Keep Scotland Beautiful for volunteer hill path and beach clearing days. Employ 2 people job sharing a Project & Development Manager post.

23. **Ullapool Tourism & Business Association (www.ullapool.com)**

Membership organisation believed to currently be in temporary abeyance. Uses a Destination Ullapool brand devise and has a visitor facing website that includes sections on: How to Get Here; Exploring the Area; Places to Stay; Places to Eat & Drink; Activities; Events Diary; Shops & Services; and a Business Directory with listings of 300 local businesses, organisations and service providers. Also has an Enquiry Form for queries and further information. Website comes up second under Ullapool on search engines.

24. **www.ullapool.co.uk**

Described as Ullapool Community Tourism and Business Website. Visitor facing website that comes up first under Ullapool on search engines. Includes sections on Self Catering; B&Bs & Guesthouses; Camping & Hostels; Hotels; Local Info; and Activities. Has listings of 30 accommodation providers. No indication of who set up or manages the site but has an enquiry form for a webmaster address. Appears to be an advertising led site as much of the content targets would-be advertisers. Some content may be significantly out of date, but it obviously must have on-going search engine optimisation.

25. **www.visittorridon.co.uk**

Visitor facing website with sections on: Accommodation; News; Activities; What's On; Weather; Tides; Gallery; & Essentials. Incorporates listings of over 80 businesses across Wester Ross. Very copy heavy site with contact form for queries and a mailing list subscription option that doesn't work. No indication of who set up and manages the site, but information appears to be up to date

26. **Visit Wester Ross (www.visitwester-ross.com)**

Membership organisation that grew out of the more localised Celtic Fringe group and aims to cover all of Wester Ross. Is one of seven key destinations groups in the Highlands supported by Highland Council from whom it receives an annual grant to deliver and support specific business development initiatives. Has also secured project funding from ERDF, VisitScotland and Wester Ross Environmental Network. Has comprehensive, visitor facing website with sections on: Where to Stay; What to See & Do; Events & Information; Wildlife; Photos and News, as well as maps and a downloadable guide to the Wester Ross Coastal Trail. Website has clear contact details for queries and incorporates listings of over 150 businesses.

27. **Wester Ross Environmental Network (WREN) (www.wr-en.co.uk)**

Independent voluntary organisation that aims to protect, enhance and promote biodiversity in Wester Ross. One of 7 local biodiversity groups in the Highlands. Has developed a Wester Ross Biodiversity Action Plan and a series of projects to deliver it. Runs small grant scheme for local projects. Supported by Highland Council, Scottish Natural Heritage; RSPB; National Trust for Scotland; Wester Ross Fisheries Trust & Scottish Wildlife Trust. Website contains clear contact details for queries and further information.

28. Wester Ross Fisheries Trust (www.wrft.org.uk)

Statutory body responsible for salmon and sea trout fisheries in the area. Aims to conserve wild fish populations and the habitats that support them in order to enhance the biodiversity, ecology and amenity of the area. Website contains clear contact details for queries and further information.