

HIGHLAND

TOURISM ACTION PLAN

2020

DELIVERING THE NATIONAL TOURISM STRATEGY IN THE HIGHLANDS

INTRODUCTION

Tourism Scotland 2020 - A strategy for leadership and growth was launched by the Scottish Tourism Alliance in summer 2012. Led by industry and supported by the public sector this strategy is based on an in-depth understanding of market opportunities matched to Scotland's capabilities and provides a common agenda for the industry and supporting organisations. The strategy targets those markets that offer Scotland the greatest growth potential and promises to collaborate within and across Scotland's tourism assets to develop the authentic experiences today's visitors seek, delivered to the consistently high quality they expect.

Our

vision is that

"The Highlands will be a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people."

By doing so we will maximise the benefits tourism brings to our businesses and communities.

DELIVERING AT A REGIONAL AND LOCAL LEVEL

In recognition of the need to identify specific opportunities and set priorities to deliver this strategy at a regional level, this action plan has been produced by the Highland Area Tourism Partnership to outline the priorities and activities that will be undertaken to grow tourism in the Highland area between 2014 and 2020.

The Highland Area Tourism Partnership has also recognised that other local strategies exist or are in development. Notable amongst these is the Cairngorms Sustainable Tourism Strategy which covers the whole of the Cairngorms National Park only part of which overlaps with the area covered by this strategy. It is anticipated that a number of destination organisations across the Highlands will be developing destination development plans for their areas while work is already under way in Moray on a local strategy. This strategy therefore concentrates on actions that extend across the whole area or which involve collaboration rather than specific local actions which are best defined elsewhere.



WHERE WE ARE NOW

Sustainable Tourism is one of Scotland's key growth sectors identified in the Scottish Government's Economic Strategy. It is a key industry in the Highland area, generating significant visitor expenditure and supporting a substantial number of local jobs.

Economic impact 2012 (Highland)

Direct expenditure	£738,432,000
Indirect expenditure	£174,391,000
Direct employment	16,820



THE OPPORTUNITY FOR GROWTH

The national tourism strategy - Tourism Scotland 2020 recognises that the greatest potential for growth comes from "Home Turf" (the UK), "Near neighbours" (Scandinavia, Germany, France, Spain, Ireland, Netherlands and Italy) and our "Distant cousins" - USA, Australia and Canada while emerging markets such as India, China, Russia and Brazil look set to grow more markedly in the longer term.

Tourism Scotland 2020 also recognises that much of the potential for growth comes from targeting specific tourism assets both individually and by encouraging collaboration across sectors to turn those assets into added value experiences. Six Scottish assets, all of which are relevant in Highland, are identified as having real growth potential, namely:

**Activities
& Adventure**

**Business
Tourism**

Cruise



Golf

**Mountain
Biking**

Sailing



The Highlands is one of Scotland's strongest tourism products and as such can reasonably be expected to equal or exceed the national growth rate if the actions in the strategy and this plan are delivered. Based on the National Strategy growth ambitions this could mean that the value of tourism could grow from a level of £738m in 2012 to between £900m and £1.07bn by 2020.



ACHIEVING GROWTH

Key to achieving this growth is making the most of our existing assets and turning those assets into experiences. This requires partners to be equally committed to quality and customer service and to combine this with complementary products and services to offer visitors an easier, more enjoyable experience. We also need to develop our assets in response to specific market opportunities and Tourism Scotland 2020 identifies four areas, all of which can be considered to offer opportunities for the Highlands.

- ▶ **Nature, heritage & Activities**
- ▶ **Destinations, Towns & Cities**
- ▶ **Events & Festivals**
- ▶ **Business Tourism**

The strategy also identifies areas where capabilities need to be built:

- ▶ **Quality and Skills**
- ▶ **Marketing**
- ▶ **Sustainable Tourism**
- ▶ **Leadership and Collaboration**

To achieve this growth will require both effort and investment by individual businesses across the tourism sector and investment by public sector partners in areas such as infrastructure and services. The National Tourism Development Framework published in July 2013 already defines some of the key infrastructure priorities for Highland.

To complement this there is a need for additional activity by the Highland Tourism Partnership and its partners from both the destinations and the public sector. This additional activity needs to focus on providing support to tourism businesses and increasing the level of collaboration between businesses and destinations and the activities in this plan are largely aimed at achieving that aim by a focus on three key areas of activity:

- ▶ **Marketing**
- ▶ **Advocacy**
- ▶ **Improving the Tourism Product**



MARKETING

1. Royal Highland Show

We will ensure strong promotion of the Highlands as a place to visit following on from the Royal Highland Show 2013, taking advantage of the Highlands & Islands focus brought about by the Highlands and Islands providing the Presidential team in 2013.

2. VisitScotland Expo

We will encourage better coordination of the Highland presence at VisitScotland Expo and will plan ahead for 2015 with a view to creating a dedicated Highland area where Highland companies can be grouped together.

3. Improve links between Destination Organisations and VisitScotland marketing activity

- Destination organisations will be more involved in the provision of content for VisitScotland marketing activities.
- We will work with VisitScotland to ensure a comprehensive range of information including non-business information is included on the new VisitHighlands website solutions.

4. Destinations and sectors to be better connected

- We will identify options for Highland destination organisations to undertake joint activity.
- We will improve the cross promotion of Highland destinations by destination organisations.
- We will encourage collaboration between sectors to ensure the Highlands' key assets area expanded into experiences that attract and retain visitors.

5. Visitor Information

We will work with stakeholders to produce a plan for the future delivery of visitor information in the Highlands – to include identifying a viable network of Visitor Information Centres and Information Points as well as mobile and technological solutions.

ADVOCACY

1. We will advocate on a number of issues to ensure the needs of tourism and tourism businesses are recognised in future developments:
 - a. Broadband provision.
 - b. Mobile connectivity.
 - c. Provision of strategic transport infrastructure and public transport.
2. It is recognised that achieving tourism growth in the Highlands requires implementation of many initiatives defined in the National Tourism Development Framework. We will both act on behalf of and assist the tourism industry in delivering these developments.
3. We will support destinations in developing a destination development plan or identifying opportunities for their area where there is demand to do so. Where there is interest from the industry in an area but capacity is limited, the public sector partners will assist in building capacity that allows the destination to produce such a plan.

IMPROVING THE TOURISM PRODUCT

1. Customer Feedback

We will improve our understanding of customer needs through:

- a. The gathering and analysis of customer feedback.
- b. Ensuring a good uptake by Highland businesses of the national customer feedback system currently being developed.
- c. Continuing to encourage businesses to make the most of the tourism intelligence available to them.

2. Business Development

We will provide a range of business development events to suit different needs. These will include events that:

- a. Allow sharing of best practice.
- b. Encourage businesses to improve their product.
- c. Demonstrate the range of support available to businesses and how to access it.
- d. Promote knowledge of the Highlands and individual destinations.

3. Customer Service

- a. We will work with the Scottish Tourism Alliance to deliver the National Skills Strategy for Tourism.
- b. We will seek to influence and address how customer service training is covered in education (schools / colleges / UHI).

4. Infrastructure

We will improve the infrastructure that supports potential growth markets notably:

- a. Nature, heritage and activities.
- b. Events including both leisure and business events (conferences).

IMPLEMENTATION OF THE HIGHLAND TOURISM ACTION PLAN

The Highland Area Tourism Partnership has been responsible for compiling this action plan and will oversee its implementation. It is recognised by all partners that the objectives of both the national strategy and this plan can only be achieved by working in partnership and involving all of the tourism community; tourism groups, individual businesses and the public sector.



Measurement

The Highland Tourism Partnership will be responsible for measuring whether the actions outlined in this plan are delivered with this being done through regular reporting to the Partnership. Ultimately it is not simply the delivery of these actions that will tell us if we are succeeding - it is the overall health of the Highland Tourism Industry that will do so. We will use a robust set of key performance indicators to measure this:

- Dedicated Highland research using the "DREAM" model which includes:
 - Direct spend
 - Indirect spend
 - Visitor numbers
 - Tourism employment
- Occupancy surveys of all accommodation sectors
- Visitor attraction visits

Contacts

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