

Nature/Activity Tourism Groups Meeting

Date: 22nd May, 2014

Venue: Creative Scotland Offices, Edinburgh

Attendance

- Fergus Ewing MSP, Minister for Energy, Enterprise and Tourism
- Martin Latimer, BMF Scotland
- Katharine Taylor, Cycle Tourism Forum
- Graeme Mclean, Developing Mountain Biking in Scotland
- Caroline Millar, Go Rural
- Stewart Smith, Golf Tourism Scotland
- Audrey Maclennan (AM), Highlands & Islands Enterprise
- Daniel Steel, Sail Scotland
- Andrew Grainger, Scottish Country Sports Tourism Group
- Gordon Todd (GT), Scottish Enterprise
- Stuart Brown, Scottish Government
- Richard Walsh, Scottish Government
- Caroline Warburton (CW), Scottish Tourism Alliance
- Marc Crothall, Scottish Tourism Alliance
- Graeme White, Scottish Development International
- Paul Easto, TS2020 Champion: Nature & Activities
- Gwen Raez, VisitScotland
- Stevie Christie, Wild Scotland
- Ben Mardall, Wild Scotland

Background

The meeting was organised by the Scottish Tourism Alliance (STA) as the Tourism Leadership Group and also as the coordinator for the [Tourism Scotland 2020 strategy \(TS2020\)](#). TS2020 was published in June 2012 and identifies Scotland's 'nature and activities' as a key opportunity for Scottish tourism.

The Scottish Tourism Minister, Fergus Ewing MSP attended the meeting. He offered some ideas on how Government could help support growth of the sector and invited further proposals from the group. He encouraged the groups to think strategically and creatively about collaborative activities. Each groups highlighted key issues and there then followed general discussion.

Opportunity for Nature & Activities Tourism in Scotland

All agreed that Scotland's outdoor tourism sector had significant potential for growth (particularly international markets) – as a high value, high spend sector.

- Adventure/Nature-based tourism is worth £1.4bn and 35,000 jobs to the Scottish economy.
- Adventure travellers stay longer, spend more and have a higher propensity to repeat.
- Despite some good progress, Scotland is still largely an unknown as an adventure travel destination in international markets.
- As the fastest growing segment in the tourism industry globally, success in adventure travel is critical to meeting Scotland's growth ambitions in TS2020.

Common Themes

Each group highlighted specific issues or activities, however four common themes emerged:

- Marketing
- Representing the Sector (Advocacy)
- Training
- Raising the Quality of Experience

Key Discussion Points

1. Benefits of Working Together

All agreed that each group's activities were dependent on Scotland's natural environment and discussion highlighted a number of common issues. The group agreed to explore such opportunities for joint working, recognising that it is not about rationalising or losing the identities of the groups, but identifying opportunities where greater efficiencies or impact can be gained from working together. These in turn will raise the profile of the outdoor tourism sector in Scotland.

All agreed that the meeting had been useful and that the group should meet again. The Scottish Tourism Alliance as the Tourism Industry Leadership Group agreed to coordinate the meeting.

AP1: CW to organise a follow-up meeting. ALL to indicate availability & identify other tourism industry groups should be invited (e.g snowsports).

AP2: ALL to send relevant Action Plans/Annual Reports/Strategy Frameworks for circulation to group.

2. Industry Leadership

There is a need to support leaders in the sector and encourage more leaders to come forward and it was agreed to explore whether the [Rural Leadership Programme](#) and [Destination Leadership Programme](#) could be adapted to the Outdoors Tourism sector.

AP3: GT (SE), AM (HIE) & CW to consider adaptation of leadership programmes for discussion at next meeting.

There was also discussion about an industry event involving all the different industry groups to raise the profile of the 'Outdoor Tourism'. *Possible topic for further discussion at next meeting.*

3. Raising the Profile of Sector with Customers (Marketing)

Visitors interested in specific outdoor activities require specialist information which industry groups can provide. There is an opportunity for VS to working more closely with groups to ensure this information is available, ideally via direct links from VS.com to suitable industry group sites, but industry could also provide direct content to VS. Also recognise the importance of events (recreational or educational) in raising the profile of specific activities was also raised.

AP4: Paul Easto and Gwen Raez (VS) to look at current situation and report back at next meeting.

4. Need for Better and More Robust Market Intelligence

All recognised the importance of data, both to quantify the value (importance) of each sector and its potential for growth, but also in identifying market opportunities. In general, businesses are reluctant to provide information on a regular and consistent basis. Could this be improved across the outdoor sector?

5. The Long-term Sustainability of Industry Groups

This is a critical issue for most groups and is largely dependent on financial support from industry in return for business benefits. There was acknowledgement of the intellectual capital within each group, i.e. product/sector knowledge and that almost all groups were run or led by volunteers. With significant time spent on administration, could efficiencies be made around the core function of groups so activities can focus on other priorities (advocacy, product development, marketing etc)?

AP5: ALL to indicate current staff resources, proportion of time spent on administration (to inform discussion between some groups on sharing resources) and duration of any project/core funding.