

Tourism Scotland 2020 Strategy Group Meeting

NOTE OF MEETING

Tuesday, 28th April 2015

SE Office, Stirling

Present:

- Ann Camus, Fife Council / SLAED
- Calum Ross, British Hospitality Association
- Charlie Smith, VisitScotland
- David Allfrey, Royal Edin Military Tattoo (DA)
- Danny Cusick, Scottish Enterprise
- Emma Sinclair, Scottish Government
- Gordon Dewar, Edinburgh Airport
- James Stuart, EPP Ltd
- Judy Rae, Glasgow Science Centre (JR)
- Russell Imrie, Queensferry Hotels (RI)
- Stephen Duncan, Historic Scotland (part)
- Stephen Leckie, Crieff Hydro Ltd (SL) – Chair
- Steven Dott, Highlands & Islands Enterprise

In attendance

- Caroline Warburton, Scottish Tourism Alliance (CW)
- Marc Crothall, Scottish Tourism Alliance (MC)
- Paul McCafferty, Scottish Enterprise (PM)

Apologies

- Chris Wayne-Wills, Macdonald Hotels
- Rebecca Brooks, Abbey Tours (Scotland)
- Paul Easto, Wilderness Scotland
- Marina Huggett, Tourism Excellence Consultancy
- Riddell Graham, VisitScotland
- Chris Taylor, Highlands & Islands Enterprise
- Ian Whitaker, Cawdor Castle
- James Withers, Scotland Food and Drink

1. Welcome

SL welcomed everyone in particular Charlie Smith, Marketing Director for VisitScotland and Steven Dott who was standing in for Chris Taylor of HIE. SL also thanked Scottish Enterprise for supporting the Strategy Group with the meeting room.

2. Approval of Note of Previous Meeting

The note of the previous meeting was approved and all actions discharged.

3. Presentation: Charlie Smith, Marketing Director, VisitScotland

CS presented the new approach to VS marketing activities. The presentation is circulated with the note of this meeting. Discussion points included:

- The willingness of the new approach to VS marketing to engage industry in advance of campaigns and how this might be achieved.
- The significance of strategic partnerships and how the Scottish tourism industry may respond to certain partnerships.
- The collective focus on driving visitors to visit Scotland, not just visitors to VisitScotland.com.

- The mechanisms which VS can use to utilise engaging content generated by the industry. The adventure tourism sector was used as an example.

In the first instance, the Tourism Leadership Group – through the Strategy Group and STA Council – would be an appropriate route to engage with the industry and provide two-way communication. GD agreed to explore whether the social networking tool Yammer (currently used at Edinburgh Airport) may be a suitable tool.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		GD to investigate whether Yammer is appropriate networking tool for TLG.	GD

4. TS2020 Update on Progress

Paper 2 was circulated prior to the meeting and approved with the following comments.

4.1 Update on Key Performance Indicators

Decisions Asked of Group	Approved?	Comments / Actions	Who?
No decisions required.	-		

4.2 Role of Strategy Group

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Final approval of Strategy Group role.	Y		

4.3 Forward Agenda

The following shortlist of topics (with sponsors and lead organisations shown in brackets) was proposed:

1. Digital Connectivity (Stephen/Judy/HIE)
2. Tourism Skills (David/Ian/SDS)
3. Tourism Data (James/Ann/VS/SE)
4. Structure of Tourism Industry / the Market and Marketing
5. Destinations
6. Innovation (R&D) (Gordon/SE/HIE)

It was agreed to circulate the list to the full strategy group to allow everyone to agree the topics.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Agree the six strategic issues (2 per meeting) to be discussed, lead organisation to support and TS2020 Strategy Group champion - see table below.	Y	CW to circulate 'voting' form. ALL to respond.	CW ALL

4.4 Strategic Framework: Food & Drink

The approach to publishing position papers in a common format for key TS2020 topics was approved.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Approve approach to 'strategic framework' paper series.	Y	Add 'how to use this document' section.	CW
Approve Food & Drink paper	Y	See comment above.	CW
Agree topics and supporters for next series of papers	Y	Where appropriate, align with 'strategic discussion' topics.	

4.5 Update on TS2020 2014/15 Projects / Asset Group Frameworks

The 2014/15 summary was welcomed. No other specific comments were received.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
No decisions required.	-		

4.6 Events & Festivals: Scotland the Perfect Stage

DA congratulated EventScotland on the development of a much improved strategy for the Events & Festivals sector. The group discussed STA's proposed role to lead industry engagement and highlighted the importance of ensuring that STA had the capacity to deliver. The degree to which Business Events are included in the strategy was also raised.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Comments on STPS & STA actions.	-	DA to feed comments back to EventScotland.	DA

5. Strategic Discussion: Unpicking TS2020 Visitor Spend Figures

Paper 6 was circulated prior to the meeting and the following comments made:

- Looking across the data, 2011 appears to have been a year with disproportionately high spend. This year was chosen as the baseline for the figures. Figures dropped after 2011 and are slowly increasing, however it is unlikely that the current 2020 target will be met.
- When the strategy was developed it was agreed that spend figures would be shown in real time. The adjusted real time spend figures show a decline, whilst the published (nominal) figures do not. The Strategy Group will need to manage this differential when the official 2014 figures are published in May.
- Decline in UK market may reflect the 'staycation' boom in 2011 and as the economy has recovered (and the pound strengthened) UK visitors are now holidaying abroad. With the UK market being so important (67%) of total spend, how do we stop this decline?
- The growth in 'Distant Cousins' and 'Emerging Markets' may illustrate a growing trend towards long-haul holidays. Although these markets are still relatively small, their growth has been rapid.
- Due to the nature of existing TS2020 activities, such as industry engagement, strategy alignment, new programmes and structural investments, the impact of such activities directly or indirectly on TS2020 targets are still to be realised.

It was agreed that the 2020 target needs to be re-forecast in light of the current economic situation, and that using VS latest growth market information, specific markets (ideally targeted regions) should be identified and a clear plan to ensure the marketing, customer journey, experience and referral are delivered in line with the TS2020 Vision.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		TS2020 Forecast to be re-cast. CS to provide market prioritisation info. Further discussion on matching TS2020 market, with VS priority markets/regions and tourism development opportunities.	CW/PMc CS

6. AOB

Strategy Group Membership: Susan Deighan, Chief Operating Officer at Glasgow Life, and Dominic McVey, General Manager at Glasgow Crowne Plaza have both been invited to join the Strategy Group.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
No decisions required			

Date of Next Meetings

15th September, 12pm – 3.30pm, SE Office, Stirling

3rd December, 11.30pm – 3.30pm, Edinburgh