

Tourism Scotland 2020 Strategy Group Meeting

NOTE OF MEETING

Thursday 2nd June 2016

Microsoft, Edinburgh

Present:

- Stephen Leckie, Crieff Hydro (SL) - Chair
- Susan Deighan, Glasgow Life
- Judy Rae, Glasgow Science Centre (JR)
- Calum Ross, British Hospitality Association
- Robert Allan, Apex Hotels (RA)
- Russell Imrie, Queensferry Hotels (RI)
- Gordon Dewar, Edinburgh Airport
- James Stuart, EPP Ltd (JS)
- Charlie Smith, VisitScotland
- Danny Cusick, Scottish Enterprise (DC)
- Chris Taylor, Highlands & Islands Enterprise

In Attendance

- Caroline Warburton, STA (CW)
- Marc Crothall, STA (MC)

Apologies

- Stephen Balfour, S Lanarkshire Council / SLAED
- Paul Easto, Wilderness Scotland (PE)
- David Allfrey, Royal Edin Military Tattoo (DA)
- Stephen Duncan, Historic Scotland (SD)
- Fiona Cook, Scottish Government
- Marina Huggett, Tourism Excellency Consultancy

1. Welcome

SL welcomed everyone, highlighting that since the group last met the Mid Term Review had been published and well received by all.

2. TS2020 Update on Progress

2.1 TS2020 Communications: the TS2020 section of the STA website is being updated and CW asked the group if any royalty free images could be provided. She also reminded the group to provide a head-shot and confirm their job title for the Strategy Group list on the new site.

2.2 Future Resources: discussions are underway regarding resources to enable STA to continue its coordination role. These discussions are being led by Scottish Enterprise on behalf of the other public agencies involved. DC provided a brief update to confirm that this was the case.

2.3 Destination Strategies: SL commented on the high percentage of destinations which were now aligned to TS2020.

2.4 Sustainability Strategy: JS outlined the process which led the Sustainability Group to the strategy shown in Paper 1, and in particular the group's intention to reflect the sustainability definition which encompasses economic, social and environmental impacts. Three opportunities were raised during discussion:

- Raising awareness of the economic relevance of tourism throughout the economy
- Social tourism
- The circular economy and tourism industry

2.5 Tourism Skills Investment Plan

The draft plan was circulated prior to the meeting and RA, as Chair of the Tourism Skills Group (TSG), summarised the plan with the points shown below. The group endorsed the Plan.

Introduction

- *The Review has taken into account the views of the TSG members, individuals across a broad range of businesses, Asset groups, destinations and others.*
- *The review was facilitated by Victoria Sutherland and Alex McTier from the Training and Employment Research Unit at the University of Glasgow, holding a number of interactive sessions with the TSG*

Progress Identified since the 2013 SIP:

- *Greater connectivity between Industry, Employers and Education (assisting in raising the attractiveness of the sector)*
- *Development of Modern Apprenticeships (MAs)*
- *More recognition that Leadership and Management provision is a key priority*

2016 SIP Skills Priorities will be:

- *Improving Management, Leadership and Enterprise skills across the sector*
- *Supporting the development of professional and digital skills for all in the sector*
- *Ensuring staff at all levels understand and are able to respond to visitor needs and expectations*
- *Raising the attractiveness of the sector*

Main focus of the Tourism Skills Group to support the SIP refresh

- *Ensuring the TSG is adequately represented going forward (some changes made over the past 6 months to membership as well as re-clarifying all current members desire to be a representative going forward)*
- *Matching the specific skills and experience of the TSG to align these with the 4 Skills priorities and aim to have a “lead on each of these”*
- *Ensuring that the TSG are communicating with the whole industry on a regular basis so to provide an updates and information on how the SIP recommendations are being embraced and put into practice. Keeping the SIP “Alive” and “Understood” within the industry is critical.*

Conclusions

- *The SIP is well aligned to TS2020 on the areas of Leadership, Digital Skills and Visitor Experience and also recognises the work being done by the various ‘Developing Young Workforce’ (DYW) Boards across Scotland to further strengthen links between education and employment.*

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Request for royalty free images for use on TS2020 section of STA website.	Y		ALL
Request to supply photo for STA website	Y	See http://scottishtourismalliance.co.uk/whos-who/ for current details.	ALL
TSIP: comments and endorsement of document.	Y		-

3. Mid Term Review – Prioritising Activities

The remainder of the meeting focussed on prioritising the priorities. The questions which guided the discussion were:

- What 2/3 activities **have** to be done in the next 12 months?
- Are there any major gaps or deficiencies that we need to address?
- Who are the key players for each priority? Should someone lead? If so, who? What are our individual and collective roles in driving this forward in a joined up way and how will progress be measured?
- Is the existing Governance structure appropriate for the next phase of TS2020? Could it be adjusted to perform better? If so how?

3.1 Group 1: Leadership / Influence Investment / Cross-Cutting Themes

3.1.1 Cross-Cutting Themes

- Key priority is communication. Getting the right messages through to the right people. One example being the need for an understanding of the national tourism strategy as part of the leadership culture, i.e. at both senior and middle management levels.
- Requirement for the creation of communication platform.

3.1.2 Enhance Leadership Capabilities:

Areas of focus (in no particular order):

- Destination/sectoral levels in order to help with advocacy on behalf of the industry.
- Middle management-equivalent: perception by group of gap in training provision at this level.
- Graduate-level jobs (raising the reputation of tourism as a career): need for graduate level jobs on graduation. Comparison made with technology sector.
- Strategy Group: responsibility to create a pipeline of individuals to step up to leadership group and asset groups.
- Opportunity to engage young people in discussions about travel and tourism in the future. Suggestion to create a Youth Council to help inform strategy (SportScotland's Young People's Sport Panel (YPSP) put forward as an example).
- Thistle Award winners: how to better use this cadre of successful businesses.

3.1.3 Influence Investment

- Need to determine the priorities where the greatest return can be gained.
- Better understanding of Government structure in order to identify who needs to be influenced.

3.1.4 Strategy Group Governance

- Focus on key issue at each meeting (a 'deep dive').
- Strategy group meetings are strategic forum, not tactical – need to start thinking about 2030.
- Meet twice a year (following discussion, there was agreement that two was too few and that three times would be more appropriate).
- Option to bring others on group from areas such as technology, academia, digital, education, international
- Members asked to attend asset group meetings once a year to ensure alignment.

3.2 Group 2: Digital / Quality of Visitor Experience / Cross-Cutting Themes.

3.2.1 Cross-Cutting Themes

The Presentation of Tourism Statistics

- General agreement that there is probably no lack of data, but it is just the way it is being accessed and presented. How do we better present and package it for the tourism sector?
- Particular need for forecasting, trends and horizon-scanning (in relation to TS2020 key messages) in order to help the industry plan. Retrospective data is less of a priority to businesses although does relate to point below.
- Quick audit of what data is collected on a regular basis, where is it held (is it publicly available), where and how is it distributed and what research is looking to be done. Are there better ways to present and distribute relevant information to industry?
- Next Steps: use existing research to test most effective ways of presenting and distributing data.
- **Lead: Charlie / Caroline** (VS are probably main contributor to this exercise).

Identifying and Prioritising Strategic Opportunities Based on Credible Data

- Developing consistent and comparable measures and datasets at a strategic level in order to be able to assess the relative value of different approaches. However need to understand what data is required, at what level (Scotland, sector, destination, town/city?) and for what purpose.
- Measures might include visitor spend, GVA, economic impact, turnover, visitor satisfaction.
- Will require commitment at Scottish Government and agency level to do things differently.

- Opportunity to put Great Britain Tourism Survey dataset online for Scotland (similar to International Passenger Survey - <https://www.visitbritain.org/nation-region-county-data>) to allow industry to manipulate data. (Lead: VS).
- **Lead: Danny / Caroline**

Engaging the Industry with TS2020: Communication of Key Messages and Opportunities

- Ensure industry is fully aware and has access to intelligence and resources to ensure industry is future-ready.
- Better availability to, and presentation of intelligence and horizon-scanning (3.1 above) to help industry understand future opportunities and engage with TS2020.
- Considerable communications resource available through partners, however need to clarify key messages and coordinate distribution.
- Need to ensure maximum efficiency of communication channels. Are we communicating with the right people? Should we be aiming to communicate with all businesses or to key organisations?
- **Next Steps: to be fed into STA resource discussions (development of TS2020 Comms matrix)**

3.2.2 Quality of Visitor Experience

Quality was considered the ultimate goal as this will drive increased spend, however it was agreed that in order to achieve this, focus should be on achieving effective leadership which in turn would lead to increase confidence to invest.



It was therefore felt that the following (taken from Mid Term Review) were critical if quality was aspired to:

- **Strategic review of 'quality' and what it will mean for Scottish tourism in 5 and 10 years' time has been initiated by VisitScotland with a new strategy expected in Autumn 2016. In addition, a review to simplify and streamline the current approach to common standards relating to the star rating quality assurance schemes is underway, led by VisitScotland in partnership with VisitEngland, VisitWales, Tourism Northern Ireland and the AA.**
- **Greater focus on understanding our international markets through better access to market intelligence and visitor feedback at national and regional levels. We need to be smarter with our use of data.**

3.2.3 Enhance Digital Capabilities

- Need to agree what are the digital aspirations for TS2020.
- Digital Tourism Scotland (DTS) considered to be key initiative.
- Opportunity to align all digital capability activities under the auspices of this initiative.
- Need to consider DTS in light of this new approach to ensure that strategic aspirations are programme is fit for purpose, with right focus, forward plan and governance.
- **Next Steps: Need to ensure TS2020 aspirations are fed into DTS.**

Dates of Next Meetings

21st Sept, 1.00pm – 4.00pm, Microsoft Offices, Edinburgh

1st Dec, 10.30am – 2.30pm, TBC, Edinburgh