

## Tourism Scotland 2020 Strategy Group Meeting

# NOTE OF MEETING

Thursday 1<sup>st</sup> December 2016

*The Howard, Edinburgh*

### Present:

- Stephen Leckie, Crieff Hydro (SL) - Chair
- David Allfrey, Royal Edin Military Tattoo (DA)
- Judy Rae, Glasgow Science Centre (JR)
- Calum Ross, British Hospitality Association
- Robert Allan, Apex Hotels (RA)
- Russell Imrie, Queensferry Hotels (RI)
- Charlie Smith, VisitScotland
- Danny Cusick, Scottish Enterprise (DC)
- Chris Taylor, Highlands & Islands Enterprise
- Fiona Cook, Scottish Government (FC)
- Bettina Sizeland, Scottish Government (BS)

### In Attendance

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

### Apologies

- Stephen Balfour, S Lanarkshire Council / SLAED
- Susan Deighan, Glasgow Life
- Gordon Dewar, Edinburgh Airport
- Stephen Duncan, Historic Environment Scotland
- James Stuart, EPP Ltd
- Marina Huggett, Tourism Excellency Consultancy

## 1. Welcome & Note of Previous Meeting

SL welcomed everyone, in particular Bettina Sizeland, Deputy Director of Tourism & Major Events at Scottish Government. The note of the previous meeting was approved.

## 2. TS2020 Update on Progress

**2.1 Key Performance Indicators:** There was discussion over the need to develop a more 'compelling economic narrative' in order to illustrate its economic contribution and importance. It was agreed that there needed to be greater understanding of the existing figures and greater consistency in presentation of statistics by all stakeholders. Do they reflect the size and characteristics of the sector? Is it clear how Scotland compares internationally, with what share of key markets and sectors? There was also a requirement to provide a clearer 'ask' to Government of what the sector needs in order to grow. CS suggested that a skilled economist could critique current figures and work with the group to create a robust narrative to illustrate the significant growth potential of the sector.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		Further scoping of tourism's economic positioning and growth ambition required. Option utilise VS Insights Team, SG Economists and external resource as appropriate	CS

**2.2 Update on Strategy Group Activities:** funding had been confirmed for the STA to continue to the Strategy Group and to lead and champion TS2020 to industry. Additional resources have also been allocated to

strengthen communications and industry engagement with TS2020 (including Scottish Tourism Week). DC added that this was a clear commitment from the public sector partners to the strategy and the continued strategic growth of the sector and recognition of its importance and value.

Decisions Asked of Group	Approved?	Comments / Actions	Who?

**2.3 Update on Asset Group Activities:** CW highlighted a few of the key activities underway within the asset groups and highlighted that the ability of these group to deliver activities and provide insights is directly linked to the resources available to support them. As asset group Chairs, JR & DA supported this stating that there was a need for support if industry is to genuinely engage and the potential impacts to be delivered. DA asked whether agencies were able to offer a part-time liaison and/or admin-support role to these groups from within their own staff.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		Repeated call to agency representative to consider providing liaison and/or admin support to help asset groups drive actions.	DC/CT/CS/FC

**2.4 Update on Key TS2020 Activities (Mid-Term Review Priorities):** CW highlighted:

- Big 5 Questions launch in September which had been well-received;
- Tourism Futures research being commissioned by Scottish Enterprise;
- Digital Tourism Scotland update (discussed later in the agenda);
- Refresh of the Tourism Skills Investment Plan (TSIP). RA, Chair of the Tourism Skills Group notified the group of the 4 new workstreams linked to the TSIP priorities and directly linked to the TS2020 Mid Term Review priorities in order to avoid duplication. He highlighted a number of significant issues facing the sector in relation to skills and employment, such as any limitations to the free movement of EU nationals, the introduction of the Apprenticeship Levy, increase in National Living Wage and pension auto-enrolment. There is also the need to focus on retention, rather than simply recruitment.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Opportunity to suggest additional trends for SE Futures Research	Y	Additional suggestions to CW by 16 <sup>th</sup> Dec.	ALL

### 3. Strategic Group 2017 -2019

CW talked the group through Paper 3 which proposed a number of amendments to the existing structure of the group. The following decisions were asked for:

Decisions Asked of Group	Approved?	Comments / Actions	Who?
Approval of change of name to Tourism Leadership Group	Y	Tourism Leadership Group to be shortened to TLG.	
Approval of amended role of the group	Y	To include Leadership and Decision-Making.	CW
Approval of group membership criteria.	Y	Proposed group size was to remain under 25 prompted concern that group may become too big and unwieldy, however agreement that 25 maximum provided scope to ensure broad representation of sector and skills. It was agreed that the Cab Sec would also be invited to join up to 2 meetings a year.	
Suggestions of other individuals to join group, particularly in relation to MTR themes.	-	This will be discussed once final Terms of Reference have been agreed and gaps in representation can be identified. Terms of	

		Reference to be drafted for approval at next meeting.	CW
Approval of Chair Requirements	Y	Agreement that chair should be senior industry representative. Need to have clear procedure for electing Chair within group's Terms of Reference in order to show transparency. Terms of Reference Terms of Reference to be drafted and made available on TS2020 website.	
Agreement on role of current TS2020 sub/asset groups in relation to TLG reporting, delivery and MTR priorities.	-	Recognition of the continued role and contribution of the sub/asset groups in aligning sectors under the TS2020 framework. Need to find additional asset 'champions' to fill vacant roles – nature & activities and destinations.	
Agreement on formation of new sub-groups for 4 MTR Priorities	-	Concern over creating more groups if existing groups or networks could provide insight required, however need to ensure focus is applied to each priority in order to ensure delivery.	
Approval of continued role of STA as secretariat to TLG	Y		
Comments on role on secretariat with sub-groups (existing & proposed)	-	Not directly discussed.	

#### 4. Next Steps – Sub-Groups & Priorities

Following discussion about the role and function of the group, the creation of four new formal groups was not considered necessary, however it was highlighted that individuals from the TLG will be required to contribute to ensuring strategic plans are developed for the strategy in relation to the four priorities. This may mean involvement in short-life working groups, new formal groups or individual discussions.

JR raised the importance of ensuring that the strategy remains industry-led, with the industry being given the opportunity to contribute to discussions. CW proposed a series of wider industry consultation workshops on the four MTR themes to allow industry to put forward their views.

The following suggestions were put forward in order to move the MTR priorities forward at a strategic level, with asset groups being asked to consider how the priorities will help stimulate growth in their own sectors.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		<ul style="list-style-type: none"> <li>• <b>Leadership:</b> utilise 'Leadership, Management &amp; Enterprise Skills' workstream within Tourism Skills Group.</li> <li>• <b>Digital:</b> Strategic Group developed to oversee DTS programme, expand to inform wider digital tourism agenda.</li> <li>• <b>Influence Investment:</b> development of an investment prospectus could be undertaken by a short-life working group involved SG, VS, SE and industry.</li> <li>• <b>Quality:</b> a next step was not identified.</li> </ul>	RA/CW
			DC/MC
			CS
			?
		STA to consider series of open industry workshops to gather views on MTR priorities.	MC/SL/CW

## 5. Moving the Digital Agenda Forwards

CS led discussion on how the development of the digital priority could be structured, proposing that activities should focus on elements which the industry can influence and duplication is minimised. Discussion was curtailed owing to time, however the following comments were noted:

- Agreement that digital priority should focus on aspects which industry can directly affect.
- Digital connectivity is one issue which is not under the direct influence of the tourism sector, however the issue will be recognised under the 'Influence Investment' priority and industry will continue to highlight its importance (via STA & other industry groups). The role of the TLG would be to ensure that information is accessible to industry on developments, such as mobile coverage improvements (see Appendix 1 below).
- Focus on increase sales & reducing costs through digital.
- Further discussion required as to whether Digital Tourism Scotland name should be use across all digital tourism activities or just in relation to the DTS project.

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		CS presentation to be circulated to group.	CW

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### Dates of Next Meetings

- Tues 21<sup>st</sup> February, Edinburgh
- Tues 25<sup>th</sup> April, Edinburgh
- Tues 26<sup>th</sup> September, Edinburgh
- Thurs 30<sup>th</sup> November, Edinburgh

Decisions Asked of Group	Approved?	Comments / Actions	Who?
		CW to send Outlook invites for 2017 meetings.	CW

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## Appendix 1 – Sources of Information about Broadband and Mobile Coverage

### Broadband

- Digital Scotland Superfast Broadband - <https://www.scotlandsuperfast.com/>
- Highlands & Islands based businesses - <http://www.hie.co.uk/regional-information/digital-highlands-and-islands/default.html>

### Mobile

- Scottish Government Mobile Action Plan (<http://www.gov.scot/Resource/0050/00501359.pdf>) launched June 2016.
- In December 2014, the UK Government agreed a £5bn legal contract with main providers (Vodafone, O2, EE & 3) to provide 90% UK coverage (voice & text) & 85% (mobile broadband) by end 2017. This equates to approximately 8000 additional UK sites, of which around 30% relate to Scotland. To help achieve this in Scotland, O2 have secured an additional 500 sites in 2015 and 2016 with another 1000 odd planned in 2017. EE have similar figures. <https://www.gov.uk/government/news/government-secures-landmark-deal-for-uk-mobile-phone-users>