

# HIGHLAND

# TOURISM ACTION PLAN

2020

DELIVERING THE NATIONAL TOURISM STRATEGY IN THE HIGHLANDS

## MID TERM REVIEW

### 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.

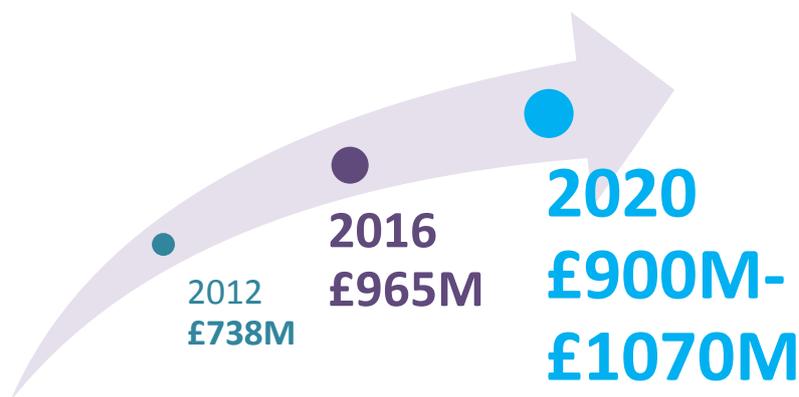
Tourism Scotland 2020 - A strategy for leadership and growth was launched by the Scottish Tourism Alliance in summer 2012 providing a common agenda for the industry and supporting organisations. In recognition of the need to identify specific opportunities and set priorities to deliver this strategy at a regional level, the Highland Tourism Action Plan was produced by the Highland Area Tourism Partnership\* at the end of 2013. The Plan outlined priorities and activities for growing Highland tourism. As one of Scotland's strongest tourism areas, the Action Plan suggested that the Highlands could be expected to equal or exceed the national growth rate meaning that the value of tourism could grow from a level of £738m in 2012 to between £900m and £1.07bn by 2020. In practice a figure of £965m was reached in 2016.



# IMPACTS FOR THE HIGHLAND REGION: OVERALL AMBITION

## Value of Tourism

Direct Expenditure



Measure	2012	2016	% Change
Total Economic Impact	£913m	£1,191m	+ 30%
Visitor Numbers	5.16m	6.09m	+ 18%
Direct Employment	16,820	20,827	+ 24%
Hotel occupancy (rooms)	62%	69%	+11%
Guest House / B&B occupancy (rooms)	44%	50%	+14%
Self-catering occupancy (units)	47%	52%	+11%
Visitor Attraction Visits*	2,279,639	3,794,201	+66%

\*to give a reliable comparison only Visitor Attractions participating in both 2012 & 2016 surveys have been included in these figures

## ACTIONS DELIVERED

Improve links between Destination Organisations and VisitScotland marketing activity

- Workshops format at May 2014 HTP and marketing workshops for destination groups held in December 2014, April 2015 and May 2016

Improving the cross promotion of Highland Destinations

- Some cross area publications
- North Coast 500
- Joint Growth Fund Activity

Support destinations in producing development plans or assist in building organisational capacity

- Development plans in 3 areas and marketing plans in 2 more, supported by public sector partners
- Establishment of 1 new group and initial business planning supported

Encourage businesses to make the most of available tourism intelligence

- Workshops with destinations supported by HIE and Business Gateway

Improve infrastructure that supports growth in nature, heritage and activity markets

- Numerous projects (South Loch Ness Trail, NCN78 Cycle Route, site improvements at Ben Nevis, Fairy Pools, Snow Roads and yacht moorings)

Improve infrastructure that supports growth of event tourism and conferences

- Inverness Campus and Conference facility improvements
- Joint work on Inverness events
- Investment in event legacy

# PROPOSED ACTIONS FOR THE REMAINDER OF THE PERIOD TO 2020

The Tourism Leadership Group carried out a mid-term review of Tourism Scotland 2020 that reported in 2016. With the alignment of tourism strategies across Scotland and improvements in collaboration since the launch of the strategy, the TS2020 Strategy Group is confident that the sector is in a strong position to collectively deliver the 2020 vision. In order to achieve this four priority areas where activity should be focussed have been identified. At a Highland level the Highland Tourism Partnership has therefore updated and repackaged the Highland activities previously identified to fit within these priorities in addition to continued collaborative marketing activity.



## STRENGTHEN DIGITAL CAPABILITIES

1. Destination and public sector organisations will continue to deliver support to businesses to increase their digital capabilities and their use of new digital technologies.
2. We will continue to gather intelligence at a Highland and destination level to ensure the industry is able to identify and capitalise on new digital innovations.

## STRENGTHEN INDUSTRY LEADERSHIP

1. All partners will continue their commitment to the Highland Area Tourism Partnership in bringing the key tourism leadership organisations together to discuss issues and opportunities.
2. The Partnership will support activities such as a Highland Tourism Conference or regional conferences to bring destinations, businesses and the public sector together.

## ENHANCE THE QUALITY OF THE VISITOR EXPERIENCE

1. We will continue to work together to identify and improve the infrastructure that supports potential growth markets, notably:
  - Nature, heritage and activities (with this now reflecting the new commitments to the Scottish Scenic Routes Initiative and marine tourism facilities)
  - Events including both leisure and business events / conferences.
2. We will continue work to improve skills as identified in the refreshed Tourism Skills Strategy including improving links between schools, further & higher education and businesses. The partners in the Highland Area Tourism Partnership will gather details of the particular challenges Highland businesses face and any barriers to resolving these to inform future employment and skills activity.



## INFLUENCE INVESTMENT

1. We will continue to try and influence investment in the specific areas defined at a national level - flight access & transport connectivity, built infrastructure, digital connectivity and business growth finance.
2. Building on the recent marketing success that has increased visitor numbers to many sites, we will work to ensure that the quality of the visitor experience and impacts on communities are not negatively affected. This will include identifying or where necessary lobbying for resources to invest in sites facing these challenges. Where appropriate we will work with communities to ensure they both contribute to and benefit from any solutions applied.
3. We will continue to support destinations taking a strategic approach to their region, through the development of plans aligned to the Highland Tourism Action Plan and identifying opportunities. Where necessary, the public sector partners will assist in building capacity to allow the destination to do so.

## MARKETING

1. Continue regional / destination consumer marketing ensuring that both VisitScotland and destination led activity is complementary.
2. Continue trade marketing with destination involvement.

### Digital Workshops



### Castle Viewpoint



### Free Wifi



### Marketing Activity



The Highland Tourism Partnership brings together the Highland Council, VisitScotland, Highlands & Islands Enterprise, Forestry Commission, Scottish Natural Heritage, Cairngorms National Park Authority, the Federation of Small Businesses and key destination organisations: Venture North, Visit Wester Ross, Black Isle Tourism Team, Visit Inverness Loch Ness, VisitNairn, SkyeConnect, Lochaber Chamber of Commerce and Cairngorms Business Partnership.