

A New Strategy for Scottish Tourism

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Executive summary

Section 2 of this strategy sets out the Scottish Executive's vision for Scotland's tourism industry and identifies the need to develop a modern tourist industry in touch with its customers; a skilled and enterprising industry which has embraced the culture of lifelong learning; and an industry which provides the quality of service our visitors demand. If the industry itself responds to this challenge tourism can take its rightful place at the heart of Scotland's economy.

Section 3 reviews the performance of Scotland's tourism industry over the last 30 years and anticipates future trends in the market. It finds that the major growth area has been in visits from overseas. This growth is projected to continue. The UK market, which is still our most important, has remained mostly static in terms of visitor numbers and spend. For this market, short breaks are the growth area of the future and this market also presents the greatest opportunity for off-season growth. Business tourism has been a major growth area for Scottish tourism in recent years and this is expected to continue.

Section 4 highlights the major changes that are impacting on the tourism industry world-wide and sets the scene for the changes that are proposed in this strategy. It draws attention

to the increasing use of new technology, in particular the internet, to the growth in competition and the increasing quality being offered by competing destinations, and to changing social trends.

Section 5 sets out the action that needs to be taken to realise the vision set out in section 2.

Section 5.1 concludes that the effective use of knowledge is one of the keys to business success. Businesses need to understand who their customers are, and what their needs are; and have to have the means to communicate swiftly and accurately with them. The internet will be one of the main means of communication with customers in future. The strategy recommends a number of actions to put Scottish tourism businesses at the forefront of the internet revolution.

Action: The STB, with SEn and HIE will establish a fully operational industry web-site by June 2000. This will present relevant market research information in an accessible form, allowing tourism businesses to improve the nature and quality of the services they provide, and tailor their individual marketing plans to suit particular niche markets.

Action: The STB's on-line booking system, Ossian, will be fully operative for e-commerce from June 2000. The Scottish Executive will set a target of 30% of accommodation businesses to be trading by e-commerce by 2002, 50% by 2003 and 90% by 2005.

Action: The STB will establish a partnership with the private sector to maintain Ossian's competitive advantage through further development.

Action: The new partnership will develop the facility to book and to pay by e-commerce for events and transport, and the use of the latest interactive technologies such as the provision of information through mobile phones, to enable visitors to access information on local attractions, accommodation and travel.

Action: The STB will establish, through partnership with the private sector, a call centre based on Ossian.

Action: Tourism Information and booking will be available through a single national and international telephone number, for the 2001 season.

Section 5.2 discusses the marketing of Scotland. The Scottish Executive will review how its network of offices overseas can assist in the marketing of Scotland as a tourist destination. The public agencies have a major role to play but success will increasingly be determined by the marketing effectiveness of individual businesses. While tourism in Scotland as a whole has increased, the rate of increase across the country has not been uniform. More needs to be done both to extend the season and to increase the benefits of tourism in rural areas. The strategy recommends that this should be tackled through the development and marketing of niche products.

Action: The STB, working with the ATBs and the private sector will develop a new marketing campaign to persuade Scots to holiday in Scotland.

Action: The Scottish Executive and STB will join with Scottish companies to co-operate when advertising overseas. This will involve companies adding the STB web site address to their own promotional material.

Action: The STB will produce a new strategy to target niche markets, focussing initially on golf, culture and genealogy.

Action: The STB will utilise the worldwide appeal of our ambassadors for sport and culture as part of the niche marketing strategy.

Section 5.3 identifies action to raise quality in the industry. There will be a new requirement to display prices and charges clearly. The STB quality assurance officers will become quality advisers. The National Transport Timetables will be incorporated into the STB website.

Action: The STB will double its quality assurance effort creating a force of quality advisors able to advise on improving quality and on best practice and to encourage managers to take advantage of training opportunities.

Action: The STB will ensure that all businesses in membership of the accommodation QA scheme display clear information, outside their premises, about prices and charges. This will include phone calls and other services.

Action: The Scottish Executive will produce a National Transport Timetable by end 2000 and the STB will incorporate this in its web site so that the customer can have easy access to the information needed to plan a visit using all modes of public transport.

Section 5.4 identifies a commitment to lifelong learning and to investment in employees as being the keys to raising skills and improving service quality in the industry. The strategy recommends that a new, industry led, skills body be established and sets targets for the uptake of Modern Apprenticeships and Individual Learning Accounts.

Action: The Scottish Executive will set up, by April 2000, a new industry led Tourism Skills body with a focus on meeting the needs of our customers through investing in the people who provide the service.

Action: The new body will:

› promote the uptake of 1,000 Modern Apprenticeships in the tourism industry by 2003.

› promote the uptake of 5,000 Individual Learning Accounts by 2002.

› work with SQA and the FE and HE sectors to identify and develop “centres of training excellence”, in the tourism sector.

› develop and promote a mentoring scheme for tourism businesses.

Section 5.5 identifies the need to keep the structure of public support for the industry up to date to match the changes in the tourism market and developments in technology. It proposes action to provide more stability of funding for ATBs, and to ensure effective support from the enterprise networks. Progress towards the targets set in the strategy will be reviewed annually with the industry.

Action: The Scottish Executive, in partnership with local authorities, will provide 3-year budgeting for Area Tourist Boards.

Action: The Scottish Executive will review the role of the enterprise networks in supporting tourism as part of its broader review of the networks.

Action: A new implementation group, chaired by the Minister and replacing STCG, will be formed to oversee implementation of the strategy.

Action: The Scottish Executive, in partnership with STB, ATB's, SEn and HIE will publish an annual report and hold an annual conference with New Ideas Workshops.

Section 6 sets out the principal indicators and targets by which the success of the strategy will be measured.

Action: We will establish a set of local area indicators and targets for area tourist boards from the suite of national targets outlined in this strategy.

Our vision for **Scottish** tourism

Scotland has the assets to be a world class tourism destination. It has magnificent scenery; a pristine natural environment; cultural and historical richness; world famous sporting attractions; and beautiful and vibrant cities. These assets have helped to make Scotland an important tourist destination already, and to make tourism an important industry for Scotland.

The environment in which Scottish tourism competes is changing. The global tourism market is increasingly competitive. Destinations around the world are becoming more accessible and more attuned to the needs of tourists. And tourism itself is being changed by developments in technology, particularly in communication and in the growth of e-commerce.

So Scotland cannot rely on its natural assets alone. Nor can it rest on the quality of service the tourism industry currently offers. The tourism industry, just like any other, must learn, invest and modernise if it is to remain competitive.

Getting the basics right, by providing a quality of service which complements and emphasises Scotland's unique assets, is the best way to ensure sustainable long-term growth in the industry and to minimise the impact of external factors like the weather.



Henry McLeish MSP
Minister for Enterprise and Lifelong Learning

Our vision for Scottish tourism is of:

- › A modern tourist industry in touch with its customers
- › A skilled and enterprising industry which has embraced the culture of lifelong learning
- › An industry dedicated to providing the high quality of service our visitors demand.

If we realise this vision, tourism can take its rightful place at the heart of Scotland's economy. It will be a sustainable industry. An industry which works for the whole of Scotland throughout the year. But this vision can only be realised if the Scottish tourism industry takes up the challenge. The Government and the public agencies will support and empower the industry. But success depends on the industry's own efforts to modernise, invest in its staff and embrace the culture of service.

Where we are now



Our strategy for the future development of our tourism industry must be based on a clear understanding of changes that are taking place in world tourism; on an appreciation of what Scotland has to offer; and on the views of those in the industry itself.

Long term trends

Over the past 30 years, there have been dramatic changes in the tourism industry. Tourism in Scotland has grown by 43% . But there have been considerable changes in the markets; which make up the total. In 1970, overseas tourists took 620,000 trips to Scotland, stayed for 8.5 million nights and spent £26 million (£230 million in 1998 prices). In 1998, they took over 2 million trips, stayed for 19.4 million nights and spent £940 million.

Visits to Scotland by UK residents show a different picture. In 1970, these visitors took 12.3 million trips, stayed for 65 million nights and spent £175 million (£1,500 million in 1998 prices). In 1998, they took 9.8 million trips, stayed 44 million nights and spent £1,540 million. UK residents are spending fewer nights in Scotland but spending more while they are here. This reflects the virtual disappearance of the main holiday market for UK residents and the rise of the short break. Over the long term, therefore, the growth in tourism in Scotland has come primarily from overseas markets.

Over the same period there has also been significant change in the volume and quality of the accommodation stock. The number of hotels in Scotland has increased from just over 2,000 in 1970 to just over 2,500 now (an increase of 25%). The number of hotel bedrooms with en-suite facilities however increased from less than 35% in 1970 to 87% in 1998. This is a real change in quality.

Employment in tourism related industries is estimated to have increased from 112,000 in 1970 to some 177,000 in 1998 (including some 17,000 self employed), an increase of 58%.

Overseas tourism

In our main overseas markets in the period between 1972 and 1998, we have seen the number of visitors from France increase from 36,000 to 133,000 and visitors from Germany increase from 43,000 to 210,000.

During the same period, the number of visitors from the USA has increased from 158,000 to 470,000. These figures reflect the growing importance of European tourism to Scotland which in 1972 accounted for 29% of all overseas tourism trips but which by 1998 had risen to 48%.

USA

The USA is the largest overseas market for leisure travellers to Scotland. Our visitors are primarily from the North East of the US, or the states of Texas, California, Florida and Illinois. The majority of our main holiday visitors visit Scotland as part of a Britain itinerary, beginning their tour in London. However increased direct flight capacity from the US into Scotland presents increased opportunities to grow the number of 'Scotland only' trips particularly short breaks from the Eastern Seaboard. The US baby boomers approaching retirement amounts to some 76.5 million of which 3.2 million claim Scottish ancestry providing good prospects for generating increased numbers of visitors from this, our priority segment.



Germany

Germany is the key European market for Scottish tourism. A sizeable number see Scotland as a destination in its own right, spending their whole holiday here rather than visiting Scotland as just one part of a Britain itinerary. German visitors have a strong interest in the environment, nature and wildlife and walking, while niche markets exist for more serious walking, cycling and golf. While the German market to Britain is set to level off, there will continue to be scope for Scotland to increase its market share. Demand for healthy tourism and eco-tourism will grow over the next few years.

France

France's geographical proximity to Britain, with excellent access routes by air, sea or tunnel, make it an important market. With the increase of direct flights into Scotland (11 per day into Scottish airports) there is potential to increase the number of visitors from France and to increase the proportion of Scotland-only visitors among these. Overseas travel is growing among the French and the increase in direct flights to Scotland presents opportunities for main-holiday business and for the fast growing short and city break segments.

Tourism from within the UK

The trend in the UK market is towards short breaks. The average length of stay by UK visitors has decreased from 5.4 nights in 1970 to 4.5 nights in 1998.

In 1998 English visitors to Scotland spent over £1 billion and Scots spent £353million making the UK market our largest. While there is still an important main holiday market for couples and families, this is in decline because of the preference for overseas holidays.

Scottish residents remain an important market for Scotland. In 1998 they accounted for 43% of all holiday tourism trips from within the UK to Scotland, and 25% of spending. There has been a long-term decline of the 8+ night market largely as a result of increased affordability and desirability of overseas summer sun holidays. But this has been balanced to an extent by growth in 1-3 night trips. This market is volatile and expenditure fluctuates widely from year to year. The Scots market presents a particularly important off season opportunity.

The opportunity for Scotland is in 1-7 night breaks for couples who:

- › are pre-family or post-family.
- › are looking for escape, freedom and reconnection with self or partner.
- › might be into an activity on holiday.
- › might be interested in culture and city breaks.
- › take a number of breaks each year.
- › book independently.
- › travel by car.



Business tourism

Discretionary business tourism is worth c. £450million per annum to Scotland. It is particularly important because of its high yield, out of season potential and links with wider economic development.

Key segments are:

- › International Association Meetings.
- › European Corporate Meetings and Incentive Travel.
- › US Corporate Meetings and Incentive Travel.
- › UK Association Meetings.
- › UK Corporate Meetings and Events.
- › Scottish Internal Association and Corporate meetings and events.

Business tourism in Scotland in the 1990s has been a success story. It has grown at a steady rate, and the long-term indicators point to continuing growth. Business tourism trips in Scotland from within the UK over the period 1990-98 have doubled from 0.9million to 1.8 million. However, as businesses began to control costs their expenditure on business trips decreased, from £265 per trip in 1990 to £160 per trip in 1998. Within the overseas markets we see the opposite, with growth in trips and expenditure most years, from a low of £49million in 1991, to a record high in 1998 of £170million. Much of this growth is from our near European partners of France, Germany and the Netherlands.

While Scotland's national image and attractions are important for this market, these must be linked to messages on Scotland's venue and facilities, business and commercial success and leading edge technology. Price, value for money and time and cost of travel to Scotland are key issues for most meeting planners.



Business tourism in Scotland in the 1990s has been a success story.



What the industry wants

This strategy has been prepared following the largest and most inclusive consultation ever undertaken on tourism in Scotland. The main issues that emerged from the views of those who have contributed were:

- › The need to understand customers and niches to market Scotland effectively
- › The need to take advantage of new technology and methods of communication
- › The need to develop and improve the marketing of Scotland
- › The need to work together and raise the profile of tourism
- › The need to improve quality and service
- › The need to improve skills throughout the industry
- › The need to tackle regionality and seasonality
- › The need for the tourism industry to be adequately supported
- › The need to make Scotland an accessible country
- › The need to develop a sustainable industry which benefits all of Scotland

Scotland's Strengths and Weaknesses

To take advantage of the worldwide growth in tourism and compete effectively with other destinations, we must build on Scotland's distinctive strengths and address its weaknesses. Taking into account the views of those in the industry who have contributed to the development of this strategy, a SWOT analysis of Scottish tourism would show the following picture:

Strengths	Weaknesses
<ul style="list-style-type: none"> › Distinctive destination appeal › Quality products and natural produce › Unspoilt natural environment › Culturally distinctive › Natural hospitality of the Scots 	<ul style="list-style-type: none"> › Short season and consequent problems with reinvesting in improving product quality › Service attitude (particularly compared to competitors) › Management skills › Price compared to competitors

Opportunities	Threats
<ul style="list-style-type: none"> › Increase in short breaks › Growth in activity holidays and growing interest in culture › Trend towards green/environmental purchasing › Growing domestic and international conference business › Huge increase world-wide in the use of new technology 	<ul style="list-style-type: none"> › Impact of short breaks on remoter areas › UK residents trend to take main holiday overseas › Competition for short breaks from overseas markets

The later sections of this strategy discuss the action we will take to meet these concerns. Most can be addressed by action taken by the Scottish Parliament; however, some matters, for example indirect taxation are reserved to the UK Government. The Scottish Executive will work in partnership with the UK Government and the European Union to provide the best possible conditions for the growth of Scottish tourism.

How the market is changing



The increasing use of technology

Technology is radically improving communication and distribution channels between customers and suppliers.

In a relatively short period, successful tourism businesses have moved from effective use of fax and e-mail, to fundamental changes in the way they do business through interactive marketing via the Internet, e-commerce, interactive TV, and database marketing.

Two hundred million people currently have access to the Internet. This is projected to increase to six hundred million (10% of the world's population) within five years.

Given this growth in Internet access, it is not surprising that doing business on the Internet is set to accelerate, particularly in the tourism sector. Travel and leisure currently accounts for 40% of global e-commerce transactions and this is set to grow from two billion dollars in 1999 to thirty billion dollars in 2003- representing 12 % of world-wide travel industry sales. All of this will see a move away from the traditional high street travel agent with a corresponding growth in direct telephone and Internet sales.

New technologies and methods of communication will mean that:

- › Consumers will increasingly access information on tourism destinations and products and make bookings on the Internet.
- › The increasing use of the Internet for e-commerce will provide new opportunities to sell accommodation and other tourism related products.
- › Use of the Internet, interactive TV and mobile channels for communication and sales to promote tourism products will set new standards in the quality, detail and accuracy of information available to consumers.
- › Multi-media and virtual reality technology offer new possibilities for enhanced presentation of Scotland's environment, history and culture via the Internet.
- › Improved access by customers to information on tourism products will make it easier for them to compare quality and prices on an international basis.



Competition

More and more countries are now competing for a share of the tourism cake. International tourism arrivals are forecast to rise to 673 million in 2000 and to top one billion by 2010. The World Tourism Organisation is forecasting world growth of 4% a year. But strongest growth is expected to be in Asia and other fast growing regions. The forecast of annual growth of tourism into Europe is 3.1%.

Social trends

Growing affluence, increasing sophistication and demographic changes influence the type of tourist that Scotland can attract. It is important to understand the impact of these changes.

Ageing population

- › Currently around 15% of the Scottish population are 65 or over.
- › Over 65's will increase from 16% (9 million) to 20% (12 million) of the UK population in the next 20 years.
- › Most EU countries have had an ageing population for the last 30 years and by 2020 one fifth of the population of Europe will be 65 or over.
- › By 2030, 69 million people in the USA will be aged over 65 (20% of the population).



Older tourists will be better travelled and more aware of the competition. However, they will have more time to travel and will be more experience than destination focussed. Scotland can attract this market by having a quality product and excellent service as standard. There are also opportunities for the development of niche products.

Cash rich-time poor

There is evidence that leisure time is being squeezed with a growth in short breaks. With growing pressures on time the value of free time increases. The key here is to provide a packaged high quality product that is booked easily in the shortest possible time. There are opportunities for city breaks and relaxing, stress busting holidays.

Smaller households

- › In 1997, there was an average of 2.5 people per household in the EU compared to 2.8 in 1981.
- › By 2010 in Scotland, household size is expected to have fallen to 2.1.
- › Over 25% of UK households were 1 person in 1998-double the 1961 figure.

This could mean more travel and more money for travel for those with fewer dependents. Single householders are also

likely to be more flexible and more independent. It will be important to offer flexible packaged products and to cater for niche markets.

Interest in the environment

- › Growing interest in our main markets for breaks that are a complete change from what we do every day.
- › Promotion of health and fitness and nature as an “experience” is becoming more important.

Scotland could have a prime advantage here with its clean, green image. However, more research is needed to determine if we have the right products in place to meet our customers needs.

A more discriminating customer

People are staying in education longer and entering the workforce later. These people will be more globally and IT aware and therefore more knowledgeable about what the competition has to offer. They will be more likely to travel and will also be more discerning. Scotland needs to be able to offer high quality products and services if we are to compete successfully for these customers. Again, there will also be opportunities for niche and special interest products.

Realising our Vision

To develop an industry which is modern, in touch with its customers, which embraces lifelong learning, which provides the quality of service its customers require, we need action across a number of fronts. This section spells out where we propose new action should be taken.

5.1 Using knowledge effectively

Knowledge is one of the keys to business success. This applies as much to tourism as to any other business. Using knowledge effectively is a two way process. Tourism businesses need to know where their customers will come from, what they will want from a holiday or conference and why they would and would not choose Scotland. They need that knowledge to design the products and services that will meet their customers' needs. Having done so, they need to be able to make sure their potential customers know what they have to offer, and they have to do this in a way which will motivate them to visit Scotland and buy their services. We will make it easier for tourism businesses to do both.

Knowing our customers

We live in a changing world, where customers are becoming more demanding and tastes are changing rapidly. We need to understand the changes that are taking place and develop our knowledge of where the tourists of tomorrow will come from and what they will want.

These changes and their implications will vary from market to market and segment to segment. They will, however, inevitably have an impact on how people make their decisions, how they access the holiday or meetings product and what they want from a holiday, short break or meeting. Increasingly, people have more choice on how to spend their leisure time and more products on which they can spend their money. Tourism businesses need to keep abreast of those developments and focus clearly on the visitors they have the potential to attract. Each area or destination within Scotland will have its own strengths and the potential to develop its own niches.

Action: The STB, with SEn and HIE will establish a fully operational industry web-site by June 2000. This will present relevant market research information in an accessible form, allowing tourism businesses to improve the nature and quality of the

Scottish tourism must aspire not simply to be part of this revolution but to lead it.



services they provide, and tailor their individual marketing plans to suit particular niche markets.

Communicating with our Customers

Channels of communication and distribution are changing rapidly as technology develops. The Internet, digital television and radio, and interactive TV all offer exciting and different opportunities to get our message across. It is estimated that two hundred million people worldwide currently have access to the Internet. This is projected to increase to six hundred million within five years. Travel industry sales via e-commerce will represent 12% of world-wide travel industry sales by 2003.

Scottish tourism must aspire not simply to be part of this revolution but to lead it.

Tourism businesses need to communicate effectively with potential visitors. Recognising the rapid advances in Internet and telecommunications technology, STB and the Area Tourist Boards set out early in 1998 to develop a “real time” database covering all tourism products and services throughout Scotland- the genesis of “Ossian”. Having invested £2.8 million to date, over 10,000 establishments in membership of ATBs covering hotels, guest houses, B&B’s, caravan and camping and visitor attractions are already searchable using the Internet. Increasing business is being generated through Ossian, initially with bookings through the traditional channels of telephone, fax and mail and also through e-mail. With the growing importance of e-commerce, it is projected that Ossian will generate very significant additional and profitable business for Scotland.



STB's web-site (www.visitscotland.net) is already established as are a network of Area Tourist Board sites. We already have over 10,000 quality assured businesses on the searchable, bookable database on the STB web-site known to the trade as Ossiian. A growing number of tourism businesses have their own web-sites and advertise on the net. However, there is a huge gap between these businesses and the least aware. For Scotland to take full advantage of the opportunities available we need a step-change in the accessibility of the whole industry via new technology.

To make this possible, the Ossiian database will be developed into a full e-commerce facility by June 2000. This will enable a determined push to bring the whole tourism sector into the world of e-commerce.

We also need to ensure that businesses that have no previous experience of IT can easily access whatever training is required to enable them to become proficient in its use. LECs and ATBs will provide tourism businesses with both general and Ossiian specific IT training.

Even this will not be enough. For Ossiian to realise its full potential it requires both substantial further investment

and the kind of enterprise and flair that will not only maximise revenue but also keep its services at the leading edge of technology and commercial practice. With this in mind, STB will be working during 2000 to secure a long-term partnership with input from leading private sector companies. In the interim period all involved, public bodies and tourism businesses, must support Ossiian fully and use it to best effect. Further investment in hardware and training is crucial as is the need to adapt to changing marketing techniques involving for example e-mail and website promotions. Ossiian and other technologies such as interactive TV will provide the capability for the competitive advantage our industry needs to succeed.

Scotland's tourism assets are world class.

The real focus for the industry is not the technology but the customer. Not all potential visitors will be internet users. For these customers the development and promotion of a single telephone number to service customer enquiries will radically improve ease of access to information about Scotland with Ossian at the core of this call centre technology. Together these developments will ensure a much faster and more comprehensive service to our potential customers.

Action: The STB's on-line booking system, Ossian, will be fully operative for e-commerce from June 2000. The Scottish Executive will set a target of 30% of accommodation businesses to be trading by e-commerce by 2002, 50% by 2003 and 90% by 2005.

Action: The STB will establish a partnership with the private sector to maintain Ossian's competitive advantage through further development.

Action: The new partnership will develop the facility to book and to pay by e-commerce for events and transport, and the use of the latest interactive technologies such as the provision of information through mobile phones, to enable visitors to access information on local attractions, accommodation and travel.

Action: The STB will establish, through partnership with the private sector, a call centre based on Ossian.

Action: Tourism information and booking will be available through a single national and international telephone number, for the 2001 season,

5.2 Marketing Scotland

Scotland's tourism assets are world class. Our scenery, our culture, our heritage and our environment provide us with a major natural advantage. It is the task of the STB to use these images to create an awareness of, and an interest in, visiting Scotland.

Target: We are setting our industry a target of achieving an annual growth rate of 3.3% in the period to 2005.



Who Does What?

BTA

- › Generic marketing of Britain as a holiday destination
- › Represents Scotland in 27 overseas offices
- › Consults STB on how Scotland is represented in pan-Britain activity

STB

- › Attracts visitors to Scotland
- › Advises the industry on market trends
- › Operates Quality Assurance Schemes
- › Advises government on tourism development
- › Supports ATB network

ATBs

- › Promote local area
- › Provide visitor services
- › Focus for trade to reach markets
- › Development and implementation of Area Tourism Strategies

LECs

- › Business development
- › Skills development
- › Product development
- › Environmental improvement

Tourism businesses have a key role in marketing their own products and services.

This may seem self-evident, but the industry has traditionally relied on the public agencies for national and area marketing. The enormous growth in direct communication between business and customer, through the Internet and other modern technologies, now means that the effectiveness and responsiveness of individual businesses also reflect on perceptions of the area and the country as a holiday destination. This is an area where there is a real need for more effective action by the industry itself.

There are also opportunities for co-operative advertising between public agencies and private companies to increase the exposure of Scotland as a tourism destination.

Action: The Scottish Executive will also review how its network of offices overseas can assist in the marketing of Scotland as a tourist destination.

Action: The Scottish Executive and STB will join with Scottish companies to co-operate when advertising overseas. This will involve companies adding the STB web site address to their own promotional material.



Spreading the Benefits

It is clear that the less accessible and less well-known areas of Scotland are not enjoying the same benefits from growth in tourism as elsewhere. Spend by tourists in areas outwith Edinburgh and Glasgow has grown by 11% over the last 5 years. But there has been growth of 24% in the 2 cities during the same period. There are a number of underlying reasons for this. They include the trend towards shorter holidays and the decline in the number of UK residents taking their main holiday here.

Scotland's tourism industry is also highly seasonal with around 40% of holiday trips taking place between July and September. Generating business outwith this period remains a major challenge. Encouragingly, however, research undertaken by STB shows that UK residents are willing to visit Scotland at most times of the year if they are offered the right product. Some progress has been made through national marketing campaigns such as "Autumn Gold" and "Spring into Summer". Many individual businesses and industry groups have also developed successful marketing campaigns and offers to attract visitors year round while many businesses are staying open longer.

Target: We are setting a target for growth in the volume of tourism in every ATB area of at least 50% of the national average growth rate.

Tourism has the potential to make a major contribution to the development of rural areas. The proposals in this strategy to use the Internet to give tourism business direct access to the customer and vice versa will be of particular benefit to rural areas. However, we need to do more. We must also look closely at how we market Scotland. To achieve greater customer recognition of the less visited and remoter areas, STB will feature a wide range of areas in all print, Internet sites, press visits and consumer sales promotions and where appropriate advertising images. While this will help, new action is required. Research shows that it is possible to influence visitors choice of destination and the time of year they visit by building up knowledge of potential customers, identifying the product (the "niche") that they want and then developing and marketing it. A greater emphasis will in future be placed on the development and marketing of niche products for rural areas.

Niche Marketing

Some “niches” lend themselves to action at the national level. These include activity holidays, culture, the environment and genealogy STB will identify the niche products in which Scotland is likely to have a competitive edge, disseminate information and with partners will determine what needs to be done. STB and partners will then market these “niches”. The first national niche to be developed will be golf. It is not only the championship courses that are attractive to visitors; golf tourism offers great potential to very many areas of Scotland including a great number of rural areas. We need to get over the message world-wide that Scotland is the home of golf.

There are many other niches that offer potential at the local level. Examples might include sailing, fishing, cruising, bird watching, archaeology, and winter sports including skiing. National and local events and festivals also provide a significant opportunity to attract visitors to Scotland, in particular to less visited areas and outwith the main season.

Key elements of low proposals for developing golf, culture and genealogy will include:

Golf

- › Increasing promotional activity at home and overseas.
- › Making it easier for visitors to access information and to make bookings.
- › Developing club hire for visitors.
- › Developing a “gateway” golf website linked to Ossian.
- › Supporting a bid for the 2009 Ryder Cup.

Culture

- › Making the cultural product more accessible to visitors
- › Introducing event ticketing as part of Ossian
- › Promoting cultural activities in existing and new markets.
- › Establishing local cultural “trails”.

Area Tourist Boards will, with partners, review their strategies to identify the niche products and markets in which their area is likely to have particular strengths. STB will help ATBs and other local partners and tourism businesses to develop and market niche products. In many cases, this will require cross boundary action by a number of ATBs working in partnership. Co-operation is sometimes more effective than competition. For example, our two great cities, Edinburgh and Glasgow, both have much to offer the visitor, and together they are likely to be able to attract visitors that they wouldn't by acting alone. ATBs, LECs, local authorities,

Historic Scotland, Scottish Natural Heritage, the Scottish Arts Council, the Gaelic Arts Agency (Proiseact nan Ealan) and the Scottish Museums Council will also work together with the industry to define local product and customer needs and, where appropriate, to develop events and festivals. This action will build on the work of the private/public sector groups that have played a key role to date in developing environmental and arts based tourism. We need specific action to lengthen the season. Firstly, STB will develop a Toolkit of practical tips and ideas to assist tourism businesses make the most of their off-season campaigns. Secondly, ATBs

Edinburgh and Glasgow will co-operate in the marketing of city breaks in Scotland.

Genealogy

- › Linking Scots genealogy websites to Ossian
- › Developing the promotional potential of Scots heritage events overseas.
- › Introducing tactical direct marketing campaigns
- › Promotion in specialist ex-pat publications.





and the Scottish Tourism Forum will encourage tourism businesses to adopt greater flexibility in servicing visitor needs throughout the season, to recognise the opportunities for extended opening created by marketing campaigns and to participate in them.

Many first-time visitors to Scotland, particularly from overseas, will go to Edinburgh and Glasgow. The cities have a crucial role to play both in attracting first time visitors and undertaking a gateway role in helping to disperse visitors throughout Scotland either as an add-on to their city holiday or as a repeat visit. This is a tremendous opportunity that will be fully exploited.

Some Scots are world famous for their sporting and cultural achievements. They can help to raise awareness of what Scotland has to offer and boost awareness of Scotland as a tourism destination, particularly overseas markets.

Action: The STB will produce a new strategy to target niche markets, focussing initially on golf, culture and genealogy.

Action: The STB will utilise the worldwide appeal for our ambassadors for sport and culture as part of the niche marketing strategy.



We are setting a target for the average Quality Assurance scheme score to be at least 3 stars by 2005. It is currently 2.8.

5.3 Quality and Service

Quality is an essential ingredient of successful tourism destinations. The quality of a Scottish holiday will determine our industry's reputation in the global tourism marketplace and in securing repeat business. We can, and must, learn from best practice elsewhere. During 2000, STB will benchmark Scotland against countries overseas that offer comparable products (these will include Ireland and Norway) and disseminate the results to businesses and to public sector partners.

Scotland should also aim to become one of the world's leading sustainable destinations. We are well placed to do so and sustainable practice will be a central theme in implementing this strategy.

Better Service-Better Quality-Better Product

There have been calls for the introduction of a scheme of compulsory registration of accommodation providers in order to improve quality. Views vary, however, as to what the conditions might be and how any such scheme should be enforced. Others argued against compulsion, pointing out that while a scheme could establish a benchmark of acceptable facilities, it could not by itself drive up quality or instil a service culture. In support of this view, there is no hard evidence from experience of schemes operating elsewhere that they have either raised standards or brought significant benefits in terms of customer satisfaction.

The voluntary approach has had some success in Scotland. STB estimate that around 90% of accommodation businesses are members of their quality assurance scheme which provides an independent guarantee to visitors of over 10,000 tourism businesses in Scotland. The scheme also provides a focus for support to tourism businesses. The Scottish Executive believes that the way forward is to build on the existing Quality Assurance Scheme.

Our aim is to see all businesses working towards improvements in their quality rating.

But that does not mean resting on our laurels. The QA scheme provides a ladder, with each rung an indicator of better quality. Businesses who progress up the ladder will win more business and increase their earnings. Our aim is to see all tourism businesses working towards improvements in their quality rating.

The STB is responsible for grading accommodation within the quality assurance scheme. It applies a consistent national standard. The purpose of grading is to provide visitors with an independent mark of quality, and to provide an incentive to businesses to improve the quality of service they offer. These purposes are complementary. The quality assurance schemes success should not be measured by the number of businesses who fail but by the numbers who move up the quality scale.

Target: We are setting a target for the average Quality Assurance scheme score to be at least 3 stars by 2005. It is currently 2.8.

The STB grading officers currently provide a basic advisory service as part of their annual visit to some 10,000 accommodation providers and visitor attraction operators.

This service will be developed and expanded. In future, the prime responsibility for driving up quality standards will rest with the STB QA staff. They will form a team of Quality Advisors. Their role will include giving businesses:

- › advice about how they can raise standards.
- › information on how they can participate in national and local marketing activities and campaigns.
- › market intelligence to help them plan their own marketing activities.
- › information about staff development and training opportunities.
- › information about IT and in particular how to benefit from the Ossian system.
- › information about where to go for more detailed advice, e.g. LECs and ATBs

This will lead to a better informed, more professional industry and one that is better equipped to compete in the global marketplace.

The enterprise networks provide business advice and support, and sometimes grant assistance, to tourism businesses. In future, such support will be directed towards achieving improvement in the QA rating.



Action: The STB will double its quality assurance effort, creating a force of quality advisors, able to advise on improving quality and on best practice and to encourage managers to take advantage of training opportunities.

Being clear about prices

Part of providing a good service is making clear to the customer what they are getting for their money. We believe that information on charges should be clear, transparent and easily accessible.

Action: The STB will ensure that all businesses in membership of the accommodation QA scheme display clear information, outside their premises, about prices and charges. These will include phone calls and other services.

Accessibility

Many of those responding to our consultation mentioned accessibility to and within Scotland as an important issue. Potential visitors to Scotland will draw comparisons with other tourist destinations in terms of convenience, integration, cost, quality and ease of access to information and booking services.

The improvements that have been made in recent years to the road infrastructure together with investment in the rail network have opened up new opportunities for Scottish tourism. A number of new, direct, scheduled air services have commenced, examples are services from Spain, The Faroe Islands, Denmark, Austria, Germany, France, Sweden and the USA.

Many of the issues surrounding accessibility, for example, the opening up of new air and ferry links, are commercial decisions which the government cannot control. We will, however, do everything we can to encourage the development of new and better transport services. We will also continue to cooperate with the UK government and the EU on issues for which they have responsibility.

We are working with local authorities, transport operators and user groups to develop a framework for the establishment and implementation of a National Public Transport Timetable in Scotland. The National Timetable system is being constructed on a network of local information centres throughout Scotland and also in England and Wales. When fully developed, the potential will exist for links to be established between the National Public Transport Timetable system and on-line booking systems such as Ossian.

Action: The Scottish Executive will produce a National Transport Timetable by end 2000 and STB will incorporate this in its web site so that the customer can have easy access to the information needed to plan a visit using all modes of public transport.



5.4 The right skills right now

If Scotland's tourism industry is to grow, much will depend on the quality of service we provide to our visitors. This quality of service depends crucially on the skills and attitudes of those who work in the industry. Given the ever-changing nature of the industry and ever growing expectations of the customer, a commitment to improvement through lifelong learning is the key. The commitment is as important to the success of the smallest tourism business in the most remote area, as it is to major companies in the industry.

Substantial progress has been made in recent years in the area of skills development. Over 50,000 people have participated in the courses developed on behalf of Tourism Training Scotland (TTS). Despite this, and many individual examples of good practice, it is clear that weaknesses remain in the areas of skills development, service standards and recruitment and employment practices.

Despite the take up of short training courses, there is still not enough attention paid to skills development within individual tourism businesses. Managers may not be keeping their own skills up to date, which is particularly important when so much is changing in the industry.



'If Scotland's tourism industry is to grow much will depend on the quality of service we provide to our visitors.'

Substantial progress has been made in recent years in the area of skills development. Over 50,000 people have participated in the courses developed on behalf of Tourism Training Scotland (TTS)

It is clear that the real challenge is to change attitudes in the industry so that all tourism employers value skills, embrace lifelong learning and invest in their own people.

Skills development needs to be driven by customer needs. There has to be an enhanced awareness of customer requirements and their implications for skills development in such areas as service, marketing and promotion and use of technology.

Alongside this, however, there also needs to be a fresh focus on the industry's other key market, its own people. Recruitment problems in the tourism industry are long standing. The industry has to compete with other employers to keep its employees and recruit new ones. To do this it needs to be more aware of the needs and aspirations of its people and committed to meeting these in areas such as rewards, training, career development and overall job satisfaction.

We will establish and support a new industry led body to re-focus attention on the people who work in our tourism industry. It will replace TTS and will bring together the industry and the organisations that have key supporting roles to play in this area- the Enterprise networks, the National Training Organisations (NTOs) and Springboard Scotland. The new skills organisation will work closely with, and have the full support of, other key players such as the Scottish Qualifications Authority, Further and Higher Education, and the Scottish Tourism Forum.

The new body will report directly to the Minister for Enterprise and Lifelong Learning. Its remit will include:

- ▶ Developing a shared vision of quality service founded on an industry-wide commitment to understanding and meeting the needs of its customers and its people
- ▶ Increasing the demand for management training driven by improved customer and market awareness, and greater recognition of core skills requirements.
- ▶ Promoting a better understanding of, and response to, customer needs, especially in the area of service quality.
- ▶ Promoting better terms and conditions, employment practices and learning and career opportunities.



The new body will have access to the full range of government support in the area of lifelong learning.

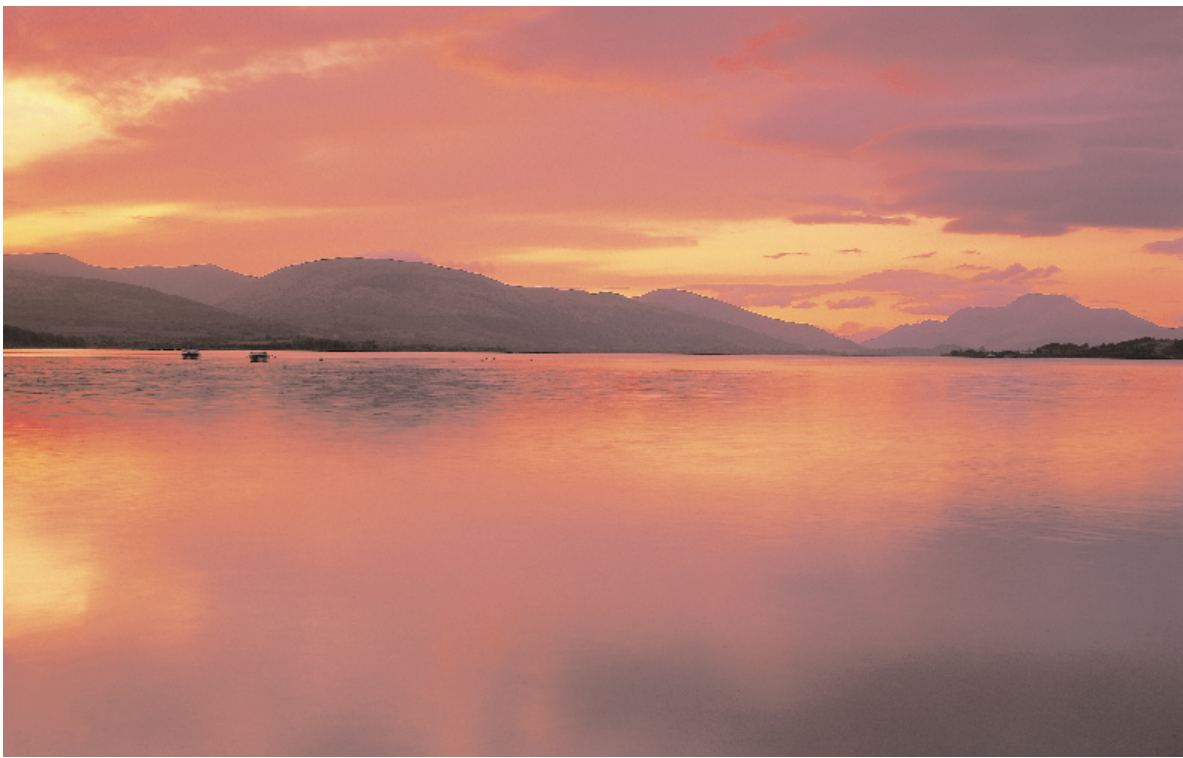
In particular:

- › The Scottish Executive will expect the Scottish University for Industry to pay particular attention to the needs of the tourism industry and, in discussion with the relevant NTOs, to give attention to the commissioning of learning materials to meet any gaps in provision.
- › The Scottish Labour Market Unit will collaborate with the new body on gathering and disseminating labour market intelligence.
- › Her Majesty's Inspectorate are publishing a report on Standards and Quality of Hospitality provision in the FE colleges which will help to inform future action.

The industry, as one of Scotland's biggest employers, should be a major beneficiary of government initiatives in the area of lifelong learning. The new body will have a key role to play in:

- › Helping the industry meet new targets of 1,000 Modern Apprenticeships in tourism
- › 5,000 Individual Learning Account holders in tourism occupations
- › promoting uptake of Investors in People

It is also important that the industry engages with FE colleges, HE institutions, LECs and other providers, to ensure that training offered by these institutions match the industry's needs. The new body will work with the FE and HE sectors and with the Funding Councils to identify and benchmark best practice, to identify and develop "centres of training excellence", and to ensure that the benefits of such developments enhance the relevance, quality and impact of tourism-related courses offered throughout Scotland. The development of a University for the Highlands and Islands may provide particular opportunities for promoting excellence in tourism training in that area.



Businesses need to identify for themselves what their customers expect and how they compare with the competition. The actions already set out for disseminating market knowledge will help them do this. There is also expert business advice available through the enterprise networks and the STB. However, in many cases the best source of advice on business success is from successful businesses. We will establish a scheme whereby new and growing tourism businesses can get advice from established and successful ones.

Action: The Scottish Executive will set up, by April 2000, a new industry led Tourism Skills body with a focus on meeting the needs of our customers through investing in the people who provide the service.

Action: The new body will:

- › promote the uptake of 1,000 Modern Apprenticeships in the tourism industry by 2003.
- › promote the uptake of 5,000 Individual Learning Accounts by 2002.
- › work with SQA and the FE and HE sectors to identify and develop “centres of training excellence”, in the tourism sector.
- › develop and promote a mentoring scheme for tourism businesses.

Some £60 million is invested annually by the public sector agencies in tourism marketing,



5.5 Getting the Structures Right

Some £60 million is invested annually by the public sector agencies in tourism marketing, promotion and product development. In addition, some £100 million was invested in tourism projects by the various EU Regional Development programmes between 1994-99 with more to follow in the new post 2000 programmes. Individual tourism businesses also invest substantial amounts annually in product development and marketing. If the industry is to realise its full potential we need to ensure that these investments mutually support each other. This new strategy will provide the framework around which we collaborate and avoid duplication.

The future of tourism in this country rests on the performance of the 20,000 or so businesses directly involved. Public sector agencies such as the British Tourist Authority, the Scottish Tourist Board, ATBs, Scottish Enterprise, Highlands and Islands Enterprise and the LECs have an important supporting role. Agencies such as Historic Scotland, Scottish Natural Heritage, sportscotland, Scottish Arts Council and the Scottish Museums Council also make an important contribution through the development and marketing of visitor attractions. It is clearly vital that collaboration between these agencies, and between the public and private sectors is effective.

SEn will work with STB, HIE and the private sector to apply the “cluster” methodology to tourism. This is designed to support this strategy by promoting wider industry engagement and joint industry action to enhance Scotland’s international competitiveness.

This strategy highlights the massive changes taking place in the global tourism market

Open to Change

This strategy highlights the massive changes taking place in the global tourism market and the pace of change in the technologies by which business is done. It proposes actions to help tourism businesses keep abreast of these changes and exploit them to gain a competitive edge. Equally, we need to ensure that the public agencies in their supporting role remain open and receptive to change themselves and that the structure of public support remains relevant, appropriate and effective.

The Scottish Executive will not promote change for changes sake. Structural change can be disruptive and distract from the task in hand. The key task for the Scottish Executive is to work with the tourism industry to implement this strategy. However there are two areas where the Scottish Executive does propose some change.

The first of these is the funding of Area Tourist Boards. The ATBs are the lead bodies for the development of tourism locally. They will be key players in helping to put the strategy into effect, and it is important that they are able to plan for the future, develop new area strategies, participate in joint marketing initiatives and so on. In order to do this they need to have confidence about the level and stability of their funding.

We have considered the suggestion that has been made by the STB and others that core funding for ATBs should be centralised through the national Board. The Scottish Executive very much values the role the overwhelming majority of local authorities play in supporting tourism, which of course goes well beyond funding ATBs, and would prefer to pursue a partnership approach. However we need to be confident that the ATBs will have the stability of funding to do the job we are asking them to do.

Funding of ATBs by STB has remained stable over recent years, while from 1996 onwards local authority funding of ATBs has declined. However this financial year there has been evidence of some stabilisation of funding by local authorities.

We will ensure that the funding that STB provides for ATBs is guaranteed for a 3 year period. The Scottish Executive has also agreed with COSLA a new approach to the funding of ATBs, with the following main elements:

- › In future, Councils will inform ATBs of funding for Year 1 by no later than 31 March in the previous financial year.
- › At the same time Councils will give their ATBs a guideline figure for years 2 and 3.
- › Councils would make a commitment that their actual allocations for years 2 and 3 would not fall below the guideline figure unless specific circumstances have changed in the interim.



We will monitor closely how these arrangements work in the 2000-2001 financial year. We expect Councils to increase their commitment to tourism, just as the Scottish Executive is doing. If it is clear that the position of the ATBs has not improved then we will look again at the case for central funding with a view to introducing it next year.

The second area concerns the role of the enterprise networks. The Scottish Executive has already announced a review of the networks, to ensure that they remain appropriate, relevant and effective in the light of the new challenges facing the Scottish economy. One of these challenges is that of helping our biggest industry realise its potential. As part of that review we will examine the role of the enterprise networks in supporting tourism to ensure that the responsibilities of the various players provide the best possible support for the industry and provide the required leadership at national and local level.

The Scottish Executive is determined to ensure that tourism becomes and remains part of the economic mainstream in Scotland. This strategy identifies new policies, new solutions and new responsibilities.

It is important that we ensure that the role and responsibilities of the Scottish Tourist Board and the Area Tourist Boards remain responsive, effective and appropriate to a dynamic, modern industry. We will look at these issues alongside the review of the enterprise networks to ensure that the future arrangements provide the required leadership for the industry at national and local level.

Action: [The Scottish Executive, in partnership with local authorities, will provide 3-year budgeting for Area Tourist Boards.](#)

Action: [The Scottish Executive will review the role of the enterprise networks in supporting tourism as part of its broader review of the networks.](#)

Review and renew

To ensure that the actions proposed in this strategy work, we need to set targets and monitor our progress towards them. The key targets are set out in section 6. We also need effective arrangements for implementing the strategy. Both the targets and the arrangements need to be reviewed regularly.

At the Scotland level

The Scottish Tourism Co-ordinating Group, meeting twice a year, has been a valuable forum for bringing the various public sector agencies together with industry representatives. In future, this function will be performed by the review workshop chaired by the Minister. In order to drive implementation of this strategy a smaller group meeting more frequently is required. The Scottish Executive will establish a new Group to monitor implementation of this strategy. This Group will be chaired by the Minister for Enterprise and Lifelong Learning and comprise industry and ATB representatives, STB, SEn, HIE and the Chair of the new training Group. It will replace the Scottish Tourism Co-ordinating Group. A new Scottish Tourism Research Liaison Group will be established to initiate and co-ordinate tourism research in Scotland.



At the local level

Area Tourism strategies are now in place in all of Scotland's 14 Area Tourist Board areas. They are proving invaluable in bringing together the partners at the local level and in identifying local needs and solutions. ATBs, LECs and local authorities together with other local partners will review all Area Tourism Strategies by January 2001 to ensure that they reflect the priorities and actions identified in this strategy.

Annual review

To enable the industry to monitor progress and review what more needs to be done, the Scottish Executive will hold an annual conference at which an annual report will be presented. The conference will review progress against the targets set in the strategy; the success of niche marketing initiatives; and the latest research on market opportunities. There will be workshops to identify new ideas for developing our tourism industry.

Action: a new implementation group, chaired by the Minister and replacing STCG, will be formed to oversee implementation of the strategy.

Action: The Scottish Executive, in partnership with STB, ATB's, SEn and HIE will publish an annual report and hold an annual conference with New Ideas Workshops.

Measuring our Success

Targets-national and local

This new strategy for tourism is both wide-ranging and far-reaching and it is important that it sets out the mechanisms for measuring progress.

We are setting ambitious targets and we need indicators to provide reassurance that the agreed actions are being undertaken and that the strategy is making a demonstrable difference to the performance of the industry in Scotland.

To measure the influence which the strategy is having, there will be two types of indicator:

› Industry indicators, which can demonstrate change in the industry. These are the collective responsibility of the industry and not of any one agency.

› Activity indicators which are essentially a check that the actions specified in the strategy are being undertaken by those who have responsibility for them.

The industry indicators are set out below.

Eleven headline indicators which represent the main tourism variables have been chosen, namely, the volume and value of tourists in Scotland, the volume and value from each of our key markets, the quality of facilities and visitor satisfaction. These are all capable of being measured from existing sources of information.

The headline industry indicators are as follows:

Headline indicators	Target by 2005
Total number of tourist trips	will be 14.3 million, which represents a 3.0% annual growth rate since 1999.
The value of tourism expenditure in 1999 prices	will be £3.1 billion, a 3.3% annual growth rate since 1999.
The value of tourism expenditure in Scotland by English visitors	will be £1,275 million, a 2.5% annual growth rate since 1999.
The value of tourism expenditure in Scotland by Scots	will be £490 million, a 3.0% annual growth rate since 1999.
The value of tourism expenditure in Scotland by USA visitors	will be £331 million, a 5.0% annual growth rate since 1999.
The value of tourism expenditure in Scotland by German visitors	will be £110 million, a 4.0% annual growth rate since 1999.
The value of tourism expenditure in Scotland by French visitors	will be £44 million, a 2.0% annual growth rate since 1999.
The volume of tourism in all ATB areas	will grow by at least 50% of the national average.
The average Quality Assurance Scheme score	will increase from 2.8 to 3.0.
The % of visitors who would definitely recommend Scotland for a holiday or short break	will increase from 75% to 78%
The satisfaction rating* for those visitors whose experience exceeded their expectations	will increase from 3.88 (1999) to 4.00.

* Satisfaction rating expressed as a scale of: 1 (much worse than expected) to 5 (much better than expected).

In addition to the headline indicators, the performance of the industry will also be measured using a series of supplementary indicators. These supplementary indicators will help to measure some of the more specific changes in the industry that the strategy seeks to influence.

Supplementary industry indicators	
Data available at national level	New Research required
<ul style="list-style-type: none"> › Scotland's proportion of visitors to the UK from the key markets (USA, Germany and France) › Number of businesses participating in Ossian › Number of tourism businesses participating in Ossian with their own websites › The number of Green Tourism Business Awards › Identification of sensitive sites open to visitors and the number with visitor management plans in place › Number of tourism businesses with special needs access › Number of tourism trips by quarter › Average number of weeks tourism businesses are open › Number of New Deal participants in tourism-related businesses › Percentage of tourism-related employees with SVQ level 3 and above › Number of tourism and hospitality vocational qualifications › Number of tourism businesses with IIP › Business birth and death rates (VAT registered) 	<ul style="list-style-type: none"> › Visitor satisfaction with information provision › Contribution of tourism to community economies › Visitor satisfaction with products › Value of product investment by tourism businesses › Visitor satisfaction with service › Investment in training by tourism-related businesses › Level of staff turnover in tourism-related businesses › Operating profit of tourism businesses › Other, social and environmental sustainability indicators

Local indicators

In order to link the new strategy with Local Area Tourism Strategies, it will be important to identify a series of core local indicators. These will be drawn from both the headline and industry indicators above and, as a minimum, they should be reflected in all local strategies.

Action: We will establish a set of local area indicators and targets for Area Tourist Boards from the suite of national targets outlined in this strategy.

Activity indicators

The final set of indicators will measure progress in implementation of the actions in this strategy. Progress against these indicators will be monitored annually and reported in the annual review.

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