

## **HIGHLAND AREA TOURISM PARTNERSHIP PLAN**

### **THE STRATEGY**

#### **1. INTRODUCTION AND BACKGROUND**

The Highland Area Tourism Partnership (ATP) comprises representatives from the tourist industry and key public bodies involved in delivering tourism in the Highlands, including VisitScotland, Highland Council, the Highlands and Islands Enterprise network, Scottish Natural Heritage, Forestry Commission Scotland, Cairngorms National Park Authority and Hi-Trans. The group was established in 2005, in order to work together to develop and deliver plans and programmes to grow tourism in the Highlands.

The Highland ATP has agreed this Area Tourism Partnership Plan (the Plan), which covers the period 2006-2015 and will replace the previous Area Tourism Strategy (2000–05). The Plan describes some of the key issues that need to be addressed in order to grow tourism in the Highlands, and to contribute to the national vision and aspiration, outlined in the new national tourism strategy, 'A Tourism Framework for Change' (March 2006), of making Scotland one of the world's foremost visitor destinations by 2015 and growing tourism revenues by 50%.

Our contribution to the national vision and aspiration can only be achieved by good partnership working between industry, agencies and communities, in delivering the agreed actions and acting as ambassadors to spread the message that Tourism is Everyone's Business. The Plan is based on the outputs of consultation including an online questionnaire, discussions with key agency staff, and a series of workshops held throughout the Highlands, with representatives from local businesses and agencies involved in developing and promoting tourism.

The Plan provides a strategic link between the national tourism strategy and any more localised tourism action plans that may be developed. It will also link with the other Area Tourism Plans that are being developed and will be implemented by other Area Tourism Partnerships, in order to facilitate a strategic overview and to achieve greater co-ordination of activity and consistency of approach. The Plan comprises a Strategy and Action Plan: the Strategy maps out the strategic direction and key objectives for the Area Tourism Partnership over the next ten years and explains the market context, strengths, weaknesses and opportunities for the sector in the Highlands; the Action Plan covers the first three years and outlines the main priorities and actions that will be taken by all partners. It focuses on the four themes for action outlined by the national strategy:

- Knowing Your Market
- Exceeding Visitors' Expectations
- Marketing Your Product
- Being Sustainable

Many of the action areas outlined in the Plan will be delivered by specific projects or initiatives and the plans for these will be appended to this document, where appropriate, when they have been produced. A lead organisation has been identified for each action area, which will monitor progress on a regular basis with the support of the ATP. The ATP partners have agreed to commit the necessary resources to the delivery of this Plan and will continue to review the resource requirements as the Plan is implemented. A full annual review of both the Strategy and Action Plan will be co-ordinated by the ATP, with specific input from the lead organisations. This will form the basis of reports to the Scottish Executive on the activity and progress being made in the Highlands to grow tourism on a sustainable basis.

#### **2. OUR VISION – *a picture of what tourism in the Highlands could look like in 2015***

Our vision is of a vibrant, growing and sustainable tourism industry in the Scottish Highlands that has responded well to the changing expectations of customers and is renowned for its quality of service and facilities and solid value for money. The responsibility for providing a warm Highland Welcome will be spread widely across businesses, agencies and the general public.

In 2015, visitors will enjoy an authentic Highland experience, in which the outstanding natural heritage and friendly local people provide a unique sense of place. The natural heritage and environment of the Highlands will be fully recognised as being central to the tourism experience and the Highland tourism industry will make a significant contribution to the protection and enhancement of the communities and the natural environment that are the centre of its attraction.

The heritage experience and message in the Highlands will be well focused and will be promoted in a clear, distinctive and co-ordinated way. The number and range of attractions will have widened, with a programme of promotion and special events and the development of new interpretation and facilities, including at GeoParks and the Cairngorms National Park. There will be a more comprehensive approach to signage and interpretation, including the use of Gaelic, and visitor attraction and facilities staff and volunteers will participate in a shared programme of training, with a high standard of commitment to customer care being evident.

Highland arts and culture, including Gaelic-interest facilities and events, will be at the heart of the visitor product and there will be an active programme of events and festivals building on the success of 2007's Scottish Year of Highland Culture. By 2015, the creative profile of the Highlands will have grown considerably and a wide range of projects will be promoted collaboratively, so that visitors find that there is an easy-to-book event holiday available for each occasion.

The range of sports and outdoor activities that visitors can experience in the Highlands will have continued to grow, and Fort William and Lochaber will be recognised as a world-class outdoor destination. Other parts of the Highlands will also benefit from this reputation for quality experiences; outdoor tourism will continue to be a key part of the Highland product portfolio, and information on how easy it is to access such activities will be readily available to visitors.

The Cairngorms National Park will continue to support a dynamic and sustainable tourism sector and the active visitor management strategy will encourage visits to other areas. All parts of the Highlands will benefit and a combination of improved interpretation, heritage trailing and focused promotion will have helped to eliminate pressure on key site capacity and will have improved dispersal of visitors across the area.

In 2015, access into and around the Highlands will have improved significantly, and there will be upgraded routes into the area and fully integrated transport options available on all routes, with clear and comprehensive travel information readily accessible to all travellers. The road journey experience will have improved as well, with good roads, plenty of places to stop and enjoy views, well signposted facilities and visitor attractions and easily accessible information on things to see and do en-route. Visitors will be able to enjoy a variety of transport options throughout the Highlands, including services operated by community and social enterprises, and the journey will be recognised as an enjoyable part of the holiday experience. The cruise liner trade will have continued to grow, bringing increasing numbers of visitors to more Highland ports, such as Invergordon, Portree, Scrabster, Gairloch and Ullapool. The coach tour market will also continue to do well, taking advantage of the wide range of attractions across the Highlands and the opportunities for taster sessions on a variety of activities, from guided walks and outdoor activities through to craftworking and traditional music sessions.

Accommodation facilities, and their rating by visitors in terms of value for money, will have continued to improve and while the overall number of beds remains much as it was in 2005, quality will be higher, as will the occupancy rates. A strong and growing market for specialist and quality tours will have been captured and there will be an upward trend in the numbers of Quality Assured properties, with a wide range of accommodation types to suit all needs and budgets. Local produce will be a common feature of menus, and customers will be delighted with the service they get from a skilled and experienced pool of kitchen and front of house staff, with a good knowledge and understanding of the local area. Improved returns and changes to contract management has meant that more stable employment can be offered, and this combined with better terms and conditions will have ensured that more young people are choosing the tourist industry as their first career choice.

All of these improvements will result in increasing numbers of visitors staying longer in the Highlands and spending more while they are here. This will be achieved through close collaboration and partnership working between businesses and agencies, with local communities that are fully involved in promoting tourism in their area.

### **3. WHAT WE AIM TO ACHIEVE**

#### **We will:**

Position the Highlands as a prime destination within Scotland that competes successfully with other countries in the global marketplace.

Develop the Highlands as a world-class product that delivers a consistently high-quality visitor experience at value for money prices, with high standards of facilities, customer service, career opportunities and income levels.

Develop a competitive industry that is economically, socially and environmentally sustainable and that supports and builds on the history, culture, environment and hospitality of its people and communities.

Encourage the dispersal of visitors throughout the Highlands, so that communities in remoter rural areas can share in the benefits of tourism.

Ensure that everyone living and working within the Highlands understands the value of tourism to the local economy and actively get involved in growing tourism.

Overall, we aim to grow the value of tourism by around 4% annually, which will be achieved primarily through an increase in visitor spend, as well as by increasing numbers. The occupancy rates will have increased, by increasing the number of short breaks and secondary holidays, the frequency of return trips and the length of the season. The increase in daily spend will continue to outpace inflation and net revenues will increase.

#### 4. SETTING THE SCENE – WHAT ARE OUR MARKETS?

##### 4.1. Global context

Tourism is now growing worldwide, after three years of low return precipitated in 2001 by 9/11 and a general increase in terrorism, and the outbreak of SARS; the World Tourism Organisation is forecasting 4 to 5% annual growth until 2020. With this growth comes increasing competition between existing holiday destinations, and with emerging and comparatively lower-cost destinations, such as some of the new EU countries – there are now over 200 countries offering a tourism product.

Trends that are likely to affect the development of tourism include: an ageing population; a ‘cash-rich, time-poor society’, with more disposable income but less time, and hence an increased propensity towards short breaks; an increased importance on leisure, health and wellbeing, and continuing education; greater and more frequent opportunities to take holidays than in the past; increasing use of the internet to source and book holidays, with a linked rise in late booking; and sustained growth in domestic and intra-regional travel. However, future increases in oil prices and limitations to supplies may limit travel in the longer term.

##### 4.2. National context

Tourism is one of Scotland's largest industries, supporting 9% of all employment and generating around £4.2bn in overnight visitor expenditure, of which, £1bn is generated annually in the Highlands and Islands, plus £6,200m from leisure day visits. In common with global trends, tourism in Scotland has also been growing since 2002, including (in some areas) recovering from the impact of the Foot and Mouth Outbreak in the UK in 2001, as well as the knock-on effects of the international events mentioned above.

<b>UK &amp; Overseas Tourism – Volume &amp; Value Figures 2005</b>				
	<b>UK Tourists</b>		<b>Overseas Tourists</b>	
	<b>Highland</b>	<b>Scotland</b>	<b>Highland</b>	<b>Scotland</b>
<b>Trips (m)</b>	1.84	14.9	0.50	2.4
<b>Bednights (m)</b>	8.04	53.9	2.48	24.3
<b>Expenditure (£m)</b>	438	3,006	146	1,208
<b>Average spend per trip</b>	238	202	293	505
<b>Average spend per night</b>	55	56	59	50

The Scottish tourism industry is heavily dependent on the domestic market – of the 17 million tourists who took overnight trips to Scotland in 2005, 86% were from the UK, of which 45% were from Scotland. UK visitors account for 71% of total tourism revenues generated in Scotland. Although only 14% of trips in Scotland were made by overseas visitors, they account for nearly 29% of the value of tourism (2005 figures) because on average they stay longer and spend more money than domestic tourists. Overseas visitor numbers are increasing faster than domestic ones – between 2001 and 2005 overseas trips increased by 50%. While European visitors make up the bulk of the market, the main single-country overseas market to Scotland is still the USA, and by 2005 it was showing tentative recovery after several years' standstill. European markets, particularly from non-EU countries, are showing strongest growth overall, partly due to improved direct air access to the country and the impact of sea routes such as the Zeebrugge-Rosyth ferry. Germany remains Scotland's main European market, and is the second top single-country overseas market after the USA.

VisitScotland's consumer research suggests that the great majority of visitors to Scotland enjoy their trip, have their expectations met or exceeded, and are very or quite likely to recommend Scotland as a holiday

destination. Their main reasons for coming are the scenery and natural environment, the wealth of things to see and do, and the friendliness of the people. Other important factors are an 'authentic' experience and the opportunity to interact with local people – this is especially true of the North American market.

Survey respondents whose visit had not met their expectations were most likely to cite the weather, high prices/poor exchange rate, the quality of accommodation and the quality of food when eating out as reasons. There is evidence that the average visitor spend has decreased in recent years.

### 4.3. Highland context

In the Highlands, tourism is an even more significant part of the local economy, accounting for 13.5% of employment in the area (excluding self employment), and around £584m in overnight visitor expenditure. Around 2.34m overnight trips are made to the Highlands each year, equating to 10.52m bednights. As in Scotland as a whole, our main market is the domestic (UK) one, which accounts for 1.84m, or 79% of trips, and spending 438m in the area. In the Highlands, visitors from the rest of Scotland are particularly important. Although the average length of stay by UK visitors is longer (4.4 nights) than in Scotland as a whole (3.6 nights), just over one third of the UK trips to the area are short breaks of 1 to 3 nights – though this is still less than in Scotland as a whole, where the short-break market accounts for a half of all UK trips.

Almost three-quarters of all trips made by UK residents are for holiday purposes, with visits to friends and relatives (non-holiday) making up another 10%. Business/conference tourism accounts for around 14% of trips (compared with 17% in Scotland as a whole). Particular challenges faced in this segment of the Highlands industry include access issues (whether real or perceived), such as remoteness and length of travel time.

The Highlands receives proportionately more overseas visitors (15%) compared with Scotland overall (9%), and is therefore more vulnerable to fluctuations in this market, although this is more relevant in some parts of the Highlands than others. Skye and Lochalsh, Inverness and Nairn and Lochaber all attract higher proportions of overseas visitors than elsewhere. Almost one third of these trips to the Highlands are made by visitors from the USA or Canada, with many coming to the area to trace ancestral links and experience the culture and heritage of the country of their forefathers. In common with Scotland as a whole, Germany is the main European market for the Highlands.

Tourism in the Highlands is more markedly affected by seasonality than in Scotland overall, with almost two-thirds of UK (54% in Scotland) and 84% of overseas trips (72% in Scotland) taking place between April and September. The dispersed nature of communities in the Highlands, which covers almost one third of the total Scottish land mass, adds to the challenge of spreading the benefits of tourism to the more outlying areas whose economies depend so heavily on it.

### 4.4. Visitor Profile<sup>1</sup>

The Highlands is very much a 'main holiday destination' for the overseas market, whereas UK visitors - particularly the Scottish market – tend to make their second holiday here (although this is less the case during the summer months). As in the rest of Scotland, tourism in the Highlands relies heavily on repeat visits. Just under one third of visitors are on their first trip to the area, although overseas visitors are much more likely to be visiting the Highlands for the first time. The most common party grouping is 2 adults of mixed gender, with the majority of visitors travelling without children. The 35-54 age group make up the bulk of the market in the Highlands and nearly one third of visitors to the Highlands are aged 55-plus, while overseas visitors are more likely to be younger than 35.

For all visitors, the car (own or hired) is by far the main method of transport while in the area and the main form of transport used for getting to the Highlands. The average length of stay in the area is 4.4 nights for UK visitors, and 5.0 for overseas visitors; average expenditure per night is around £55 per person for UK visitors and £59 for overseas visitors. Hotels are the most popular type of accommodation used by all visitors, although B&Bs are popular with the overseas market. Self-catering accommodation is most likely to be used by UK visitors from outwith Scotland.

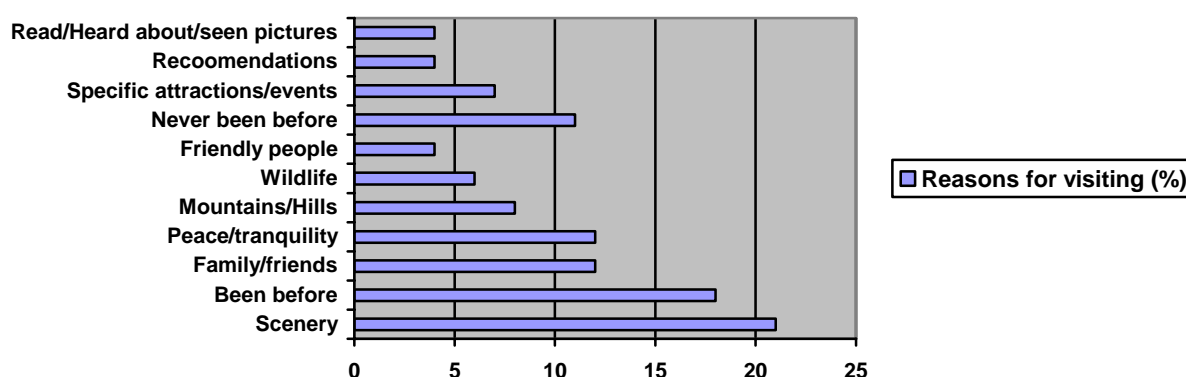
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<sup>1</sup> Sourced from the Highlands Visitor Survey 2002-03 & the Tourism in Highlands of Scotland 2005 fact sheet – for more information on Scottish tourism statistics, please refer to [www.visitscotland.org](http://www.visitscotland.org)

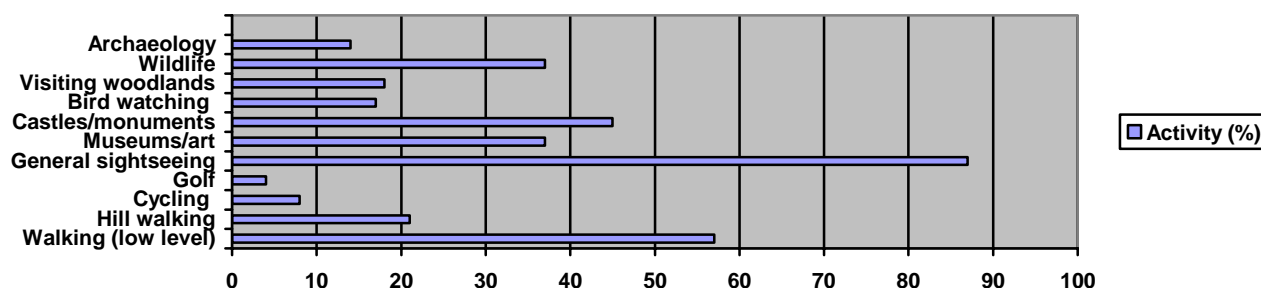
**Accommodation Used During Trip (2005)**

	UK Nights (%)		Overseas Nights (%)	
	Highland	Scotland	Highland	Scotland
Friends/Relatives	16	37	8	34
Hotels/Guesthouses	23	27	35	29
Self Catering	28	11	7	11
Camping/Caravanning	15	11	16	6
Bed & Breakfast	10	6	24	9
Hotel/University/School	3	2	5	8
Other	5	6	5	3

The main reasons for visiting the Highlands are the unspoilt scenery, previous knowledge of the area, having family, friends or connections in the area, and liking the area and the peace and quiet. For most visitors, the decision to come here has been influenced by previous visits, advice from friends/relatives, and brochures, although use of the internet as means of sourcing holiday information continues to rise.



Just under two-thirds of visitors take part in some sporting activity while in the Highlands. The most popular individual activities are general sightseeing, walking (more than 2 miles), visiting castles or monuments etc, and visiting museums/art galleries, while fishing and field/nature study are relatively more popular in the Highlands than in Scotland as a whole.



Our visitors have high satisfaction levels in terms of their overall trip experience, and are highly inclined to recommend the Highlands as a holiday destination to others.

**5. FUTURE TOURISM MARKETS IN THE HIGHLANDS**

Scenario planning can try to predict future trends and paint a picture of the likely tourism market in future years. This work, carried out at the national level in VisitScotland, suggests that in the Highlands in 2015, there might be a greater focus on short-break tourism, although the average length of stay in the Highlands will continue to be longer than for the rest of Scotland and the length of stay will vary considerably throughout the different parts of the Highlands. Business tourism will be a strong growth sector in some parts of the Highlands, facilitated by local tourism ambassadors promoting opportunities for conferences and events. Competition for visitors will be stiff and visitors will expect a warm Highland welcome and a can-do attitude,

wherever they go. They are likely to be increasingly time-pressed with expectations that their experience will be smooth and any problems sorted out quickly. The great majority of visitors will live within a 3- hour travelling distance from their final destination in the Highlands. Easy booking and good access will be crucial and increasing numbers of people will access information and/or book their trip using ICT, through a variety of modes, including internet, podcasts etc. Visitors will want self-discovery and chances to try new things, and will be older, better travelled and more sophisticated, with an interest in culture and the arts - they will be looking for opportunities to experience an authentic Highlands.

Population changes mean that visitors will be older, the pool of younger talent in the workforce will reduce and more of our workers will be born outside of the Highlands, or even Scotland. However, the ageing population and high proportion of small businesses in the Highlands also present opportunities, through experienced, enthusiastic second careerists and older entrepreneurs, who will be well placed to meet the needs of the changing visitor profile. The main opportunities for growth could come from the UK market, along with Europe and North America. Long-stay or long-haul markets will still be important and a relatively higher proportion of overseas visitors are likely to continue to visit the Highlands compared to the rest of Scotland.

## 6. STRATEGIC CONTEXT

This Area Tourism Partnership Plan is set in the national context of the 'Tourism Framework for Change'; 'A Smart, Successful Scotland', the Framework for Economic Development in Scotland; and the Sustainable Development Strategy for Scotland, to ensure that there is a sound basis for the priorities and actions outlined within it.

At an area level, the Plan takes account of the priorities outlined in partner strategies, including for example HIE's 'A Smart, Successful Highlands and Islands'; the Highland Wellbeing Alliance's Highland Community Plan 2004-07; the Sector Skills Agreement signed up to by employers and stakeholders; the Structure and various Local Development Plans and local area economic/community plans. Other current, or future, points of reference include the strategic regional transport priorities being developed by Hi-Trans, and the Highland Council Renewable Energy Strategy and Access Strategy. The Cairngorm National Park Authority's Strategy for Sustainable Tourism is an important resource, particularly for tourism in the Badenoch & Strathspey area, but also with wider regional implications. Highland 2007's priorities, including developing programmes to build on what is achieved during 2007, and the activities of HI-Arts, lend some regional context to the priorities in culture, events and sport.

Many other national strategies have been considered in the development of this Plan. Among these are the priorities set out by VisitScotland, EventScotland, sportscotland, Forestry Commission Scotland, the Sustainable Tourism Unit (formerly the Tourism & Environment Forum), Scottish Natural Heritage, Historic Scotland, the National Trust for Scotland, Bòrd na Gàidhlig and the Scottish Museums Council.

## 7. KEY THEMES AND ISSUES

### 7.1. Issues

Some issues are common to the general economy, not only the tourism sector. For example, transport to and within the Highlands is a fundamental economic and social requirement. For the tourism sector, ease of access to the Highlands by all modes of transport is crucial. More direct access links by air and faster rail links from the Central Belt and beyond could have positive impacts, including the potential to further grow business tourism to the area – an important market, particularly during the shoulder months. Within the area, strengthening the public transport system and improving integration of transport links would undoubtedly further help to offset the limiting factors imposed by seasonality and remoteness from key markets.

Staff recruitment and retention is a major issue for the Highlands, particularly in areas faced with shortages of affordable housing. Posts may be filled on a short-term basis only, reducing the incentive for employers to invest in staff training. Owing to the enlargement of the EU and low unemployment in the UK, the Highlands has witnessed a recent increase in the population of migrant workers from Eastern Europe, notably Poland, many of whom fill vacancies in the tourism industry that are not sought by local residents because of low wages, seasonality of employment, or lack of affordable housing. Language barriers (from employer, employee and visitor perspectives) can be an issue, and this needs to be considered in the general push to drive up skills in the industry at all levels. This can significantly impact on the authentic experience that visitors expect when they come to the Highlands.

HIE has been to the fore in stimulating leadership training and workforce development in the area, and much has already been planned in this regard via the Network's collaborative working with People 1st and

Springboard Scotland, including the rolling out of training programmes and schemes such as Hospitality Assured. However, challenges remain in how to ensure that training programmes reach the people that need them most, including overcoming obstacles such as lack of awareness, lack of time, and in some cases general lack of interest with regard to staff training.

## **7.2. Strengths**

The major strengths of the Highlands - and by far the main reason that visitors come here - are the quality of its landscapes and natural heritage and the iconic images that they present. The region boasts more Munros and National Scenic Areas than anywhere else in Scotland; it contains both a National Park and a GeoPark and offers a wealth of accessible wildlife in a backdrop of magnificent land and seascapes. The quality of the natural heritage is the critical resource of Highland tourism and the one that, despite its international reputation, consistently exceeds our visitors' expectations. A key priority in aiming to grow tourism sustainably, therefore, will be to work collectively to protect the natural environment, while also using it to best effect to both attract and retain visitors to the Highlands. Educating everyone about the social, economic and environmental importance of our natural heritage will be crucial, including visitors who enjoy many outdoor activities in the area.

The Cairngorms National Park Authority is leading the way in the Badenoch & Strathspey area with its Strategy for Sustainable Tourism in Britain's largest National Park. In the north, the wide-open, unspoiled landscapes of Caithness and Sutherland include the species-rich peatlands and Flow Country and the Northwest Highlands GeoPark, while Thurso is increasing its international reputation as a venue for watersports, particularly surfing. Land and marine based wildlife watching is a growing attraction throughout the Highlands, which supports some of Scotland's best known wildlife, including red deer, red squirrel, pine marten, capercaillie, otters, Atlantic salmon, bottle-nose dolphins and seals, as well as little known species, such as pearl bordered fritillaries, freshwater pearl mussel and sea lampreys. Many important and iconic habitats increasingly interest visitors, for example, freshwater lochs (e.g. Loch Ness), woodlands (Sunart Oak Woods and Scots Pine at Beinn Eighe) and the sea lochs of the west coast and broad firths to the east. Walking and hill-climbing are enjoyed throughout the Highlands, with particularly spectacular vistas in Wester Ross, Sutherland and Skye and Lochalsh. Lochaber's landscapes and associated all-season activities have helped the area position itself as the Outdoor Capital of the UK, building on several years' success in attracting major and in some cases international events to the area, including the forthcoming Mountain Bike World Championships in 2007. The growing city of Inverness draws visitors into the Great Glen and the world-famous Loch Ness, as well as to the more pastoral landscapes and coastal communities of the Inner Moray Firth and Nairn.

The Highlands supports a rich cultural heritage and its wealth of traditional music and Gaelic give it a very strong and unique identity. There is also a distinctive and well preserved built heritage, with buildings and remains that span every era of Scotland's rich History. It is even said to contain the "jewel in the crown of Scotland's Architectural Heritage" – Cromarty. The diversity of landscapes and communities and the mix of town and rural experiences can offer a wide range of both outdoor and indoor activities and an extremely lively social scene. All these features give the Highlands its sense of place and attract visitors who are drawn equally to the sense of remoteness and the vibrancy of its communities, as to the wealth of iconic images that are associated with the region.

## **7.3 The Way Forward**

The work of this Plan will build on previous strategic efforts to develop a "dynamic, responsive and sustainable tourism industry" that were outlined in the Area Tourism Strategy for 2000-2005. Reasonable progress was made towards delivery of tasks outlined in that document, although many were classed as still 'ongoing' by the end of the strategy life. High-level targets for growth in volume and value were not met, perhaps due partly to over-ambition in setting targets, but also undoubtedly affected by the general downturn in visitor numbers during 2001 and 2002. There was also recognition by partners that future strategy development should aim to engage the industry more, and add as much value as possible to what partners are doing independently. A recurring theme throughout the consultations on this Strategy is the need for greater joint working within the public sector and with industry partners. Improved partnership working and developing clear mechanisms for co-ordinating and focusing effort should be key priorities for everyone.

It is very much the case in the Highlands that "tourism is everyone's business", and the responsibility for the development of the industry lies not only with those directly involved in tourism but all those encountering visitors to the Highlands – for example in shops and banks, in taxis, on buses and trains, and in pubs and restaurants – all of whom can strive to be friendly and helpful ambassadors for the area, and contribute towards making the Highlands a key 'must-visit/must-return' destination, which will allow it to compete successfully in the global arena.

## 8. THE FRAMEWORK – OUR OBJECTIVES, PRIORITIES AND TARGETS FOR THE NEXT DECADE

The Highland Area Tourism Partnership has agreed the key objectives and priorities for the next three years, taking into account the market context and the area's key strengths. The Plan covers some nationally relevant issues but primarily focuses on issues raised in local consultations and by relevant organisations. As described earlier, the human and financial resources required to implement this Plan have been considered by the partner organisations in committing to the Plan and this will be reviewed on an ongoing basis. The principles of sustainability will underpin all our activities to grow tourism and this is reflected by the inclusion of relevant sustainability actions in each section, in addition to those outlined under the specific theme: Being Sustainable.

### **8.1. Knowing Your Market**

#### **8.1.1. Context**

The national framework aims to establish a Tourism Research Network, in order to ensure that we have up to date market information, and in the Highlands we need to ensure that local information gathered is relevant and that we can use it effectively to plan our activities.

#### **8.1.2. Issues and strategic opportunities**

There is an opportunity to input to, and influence, the work undertaken by the Tourism Research Network to ensure that it meets local needs. We need to identify new research requirements and clearly identify the questions that require answers. We must collect the right information; establish active networks to disseminate the information; actively promote information sharing and networking between partners and gather feedback and monitor performance on a regular basis.

#### **8.1.3. Our Strategic Objectives**

To ensure that we have access to or can gather the relevant information needed to allow us to understand our markets; measure the success of tourism and its contribution to the local economy; monitor the results of our efforts to grow tourism in the Highlands.

#### **8.1.4. Our Priorities**

Promote co-ordination, integration and partnership working on data collection and sharing of information that informs the planning, management and delivery of marketing, services and projects.

*Gather information at both the regional (i.e. Highlands) and sub-regional (e.g. Caithness, Sutherland, Lochaber) levels; collection areas to be defined by the product topic.*

#### **8.1.5. Key Targets**

Review local research requirements and develop regular dialogue with the national Tourism Research Network to agree any Highland specific needs/inputs by December 2006.

### **8.2. Exceeding Visitors' Expectations**

#### **8.2.1. Context**

Only 20% of the 50% growth target for Scottish tourism is based on increasing the number of visitor trips as a result of our marketing and the quality and range of products. The majority of the growth potential lies in providing the things to see and do that will make visitors want to stay longer and spend more money.

#### **8.2.2. Quality of Visitor Experience**

The quality of the natural and cultural heritage in the Highlands is second to none but it is essential that there is a consistent quality across all elements to ensure a total quality experience, which is authentic and makes the most of our outstanding cultural and natural heritage. All businesses and service providers must do all they can to deliver a quality product based on local market needs. Although many aspects of the Highland experience make it a world-class destination, attention also needs to be paid to providing and improving basic facilities such as public toilets, car and coach parking, litter collection etc. We need to improve co-ordination of services such as public transport and ensure that visitors are able to access up-to-date information about them. Shops and restaurants need to offer local produce and good value for money, and provide excellent standards of service and customer care.

There are many opportunities to maximise the potential of the Cairngorms National Park and the existing and proposed GeoParks in terms of promoting tourism, educating and raising awareness and developing activities and facilities. We need the involvement of local people, as individuals and communities, to be ambassadors for tourism in the Highlands, to have Pride and Passion in their area and to care about all aspects of their living and working environments if we are to fulfil all our visitors' expectations. We also need to improve the level of joint working between public sector bodies, ensuring that organisations responsible for supporting tourism

collaborate effectively and build better links with, and seek to influence, other bodies such as Access Forums, Landscape Forums, local and national biodiversity groups, SEERAD and landowners.

#### **8.2.2.1. Our Strategic Objectives**

To give our visitors an authentic experience that meets or exceeds their expectations and provides good value for money.

To encourage everyone living and working in the Highlands to act as ambassadors for the area, to promote it as a must see/must return destination.

#### **8.2.2.2. Our priorities**

- a) Improve the quality and value for money across all accommodation, facilities and services and provide a flavour of local traditions, character and style.
- b) Increase the number, availability and quality of facilities to ensure that visitors have ready access to basic amenities throughout the Highlands and are able to easily find out about them.
- c) Improve co-ordination of activities between public sector bodies involved in growing tourism to ensure that infrastructure, amenities and services provide multiple benefits for communities and visitors and make best use of resources.
- d) Improve access to all available products through single entry points, making it easier for visitors to do more during their stay.
- e) Increase participation by local communities in growing tourism and raising general environmental standards.
- f) Ensure that relevant staff in all public sector organisations have a good knowledge of tourism in their area.

#### **8.2.2.3. Key Targets**

Significantly improve the range and quality of accommodation, attractions and facilities in the Highlands by 2010.

Improve access to all available products through single entry points, increasing the range and number of activities that can be booked together and alongside accommodation.

Establish clear mechanisms for co-ordinating activity between public bodies by July 2007.

Actively engage 75% of communities in tourism issues by 2009.

#### **8.2.3. People and Skills**

As outlined earlier, negative perceptions of working in tourism and the service industry persist and employers are finding it increasingly difficult to find staff, having to rely on a transient workforce with little knowledge of the local area, and sometimes poor language skills. Staff shortages, perceived costs, the short-term nature of contracts and past availability, lack of flexibility and fitness for purpose of training programmes, have discouraged businesses from enabling staff to participate in training. The high number of small businesses, often with single operators, makes it difficult for owners to access training at appropriate times and locations.

A great deal of good work has already been done by Springboard Scotland and People 1<sup>st</sup> in ensuring that content and delivery of training is appropriate and raising the profile of career opportunities in Tourism and Hospitality, and the HIE Network has a leading role in helping the industry to develop leadership and workforce skills. A Tourism Skills Action Plan has already been prepared, which focuses on four priorities: raising management and leadership skills; improving customer service skills; improving chef skills and addressing retention. These priorities were identified through a detailed UK-wide Sector Needs Analysis and will be measured using the Skills Passport.

A very diverse range of skills are required in order to deliver the tourism product in the Highlands, many of which reflect the importance of the natural heritage to Highland tourism, including, for example, tour guides, wildlife watching, outdoor activities and heritage interpretation. Although these skills already exist, much can be done to develop them further. Greater knowledge and use of foreign languages by staff and in welcome literature, menus etc are desired, to help improve the experience of international visitors. All these problems are exacerbated by the fact that people can enter the industry with little or no qualifications or experience.

These issues can be addressed through workplace training and development, provided at times and places to suit the businesses, but more needs to be done to encourage uptake. This is more likely to happen with a more stable workforce and much can be done collaboratively, to investigate options for annualised contracts and recruitment brokers.

#### **8.2.3.1. Our Strategic Objectives**

To address the shortages of appropriately skilled and experienced staff across the Highlands.

To engender a more positive attitude to the value of the service industry in the Highlands, improving its status, training, pay and conditions.

#### **8.2.3.2. Our priorities**

- a) Improve content, quality, relevance and delivery of vocational training in tourism, starting in schools
- b) Increase levels of recruitment and retention of staff with a positive attitude, enthusiasm for, and knowledge of the local area
- c) Improve uptake of available staff training and development programmes across the Highlands
- d) Improve the standard of management and leadership skills across all tourism operators in the Highlands
- e) Identify need for, and establish and promote, training courses to improve standards of visitor services jobs associated with the natural heritage e.g. wildlife guides, rangers etc and specialist guides e.g. cruise tour guides.

#### **8.2.3.3. Key Targets**

By 2015, 80% of managers in the Highlands will have achieved level 3 recognition and 80% of front facing staff and chefs will have achieved level 2 recognition (as per the Tourism Skills Action Plan).

Significantly improve the status of the tourism industry in the Highlands and the numbers of people entering the industry as a career.

#### **8.2.4. Innovation and Product Development**

There is a great deal of potential to develop facilities and attractions in line with the national product portfolio and to consolidate the high reputation that the Highlands already enjoys for its outstanding scenery and wildlife, quality local produce, outdoor activities and cultural and creative heritage. The Highlands can provide a wide range of products and it is crucial that this is co-ordinated to present a coherent package to visitors that focuses on the whole holiday experience. Visitors increasingly want new experiences and we need to cater for both the committed enthusiasts and the people wanting taster sessions; these choices can be offered across all sectors – wildlife/eco-tourism, sports and outdoor activities, arts and culture and so on.

Our efforts must be concentrated on improving information on, and access to, a broad range of facilities, services and attractions; providing the necessary infrastructure to support this improved access; and ensuring that our visitor management activities are properly targeted to disperse visitors throughout the region and to protect sensitive locations. There are various examples of successful product development and visitor management across the Highlands and many further opportunities exist. For example, the Cairngorm Funicular Railway is a significant draw, which is in use all year round, thereby helping to extend the visitor season. There is scope to build on the increasing interest in the environment of the Highlands through further product development to make nature more accessible, for example, nest cams, seabird centre, GeoParks etc. Also, there are further opportunities to develop the natural and cultural heritage provision as an integrated trail. This must be achieved through networking and collaboration between tourism providers and the integration of different sectors in product development – for example, the Forestry Commission 'Touch wood' programme, the proposal for a fringe festival to accompany the Inverness Highland Games and Tattoo and the approach to integrated programming in Lochaber (Mountain Film Festival, Mountain Bike Championships etc).

Outdoor activities are an important part of the product throughout the Highlands, but significant progress has been made in positioning and promoting Fort William and Lochaber as the Outdoor Capital of the UK. This will undoubtedly help to draw visitors into other parts of the Highlands and will help to promote the outdoor market in these areas. There is great potential to develop and market a broad range of outdoor activities across the Highlands, particularly walking (including low level routes and local walks), cycling, mountain biking and paddlesports, and work can be done with the governing bodies of key sports to ensure quality and safety standards are met.

The Forestry Commission have made great progress in making provisions for mountain biking in their forests, e.g. Laggan Wolftrax, and the UCI Mountain Bike World Cup and, in 2007, the World Championships are held in Fort William. There is potential to build on the opportunities provided by the Ryder Cup which will be held at Gleneagles in 2008, given the strong interest in golf worldwide. The further development and promotion of core path networks will support walking but improved access provision in key locations is also important if other activities, such as paddlesports and canyoning are to grow. Sensitive visitor management will be required to protect vulnerable sites and any access improvements must be promoted alongside the Scottish Outdoor Access Code, to help reduce any negative impacts. Consideration must also be given to upgrading infrastructure to support snowsports in key areas. There should be a focus on developing comprehensive product portfolios that build on and link existing opportunities for adventure and outdoor activities, as well as encouraging the development of other niche activities.

#### **8.2.4.1. Our Strategic Objectives**

To make best use of available information to plan investment in new or improved tourism products and business operations, in order to ensure that the product meets the needs and expectations of the market.

To improve communication, co-ordination and integration of activities and services across the Highlands, delivered through successful collaboration and partnership working between agencies and industry.

#### **8.2.4.2. Our Priorities**

- a) Increase the range of things to do and see in the Highlands, particularly focusing on the development of landscape/natural heritage attractions.
- b) Support tourism businesses to be aware of, and cater for, international markets.
- c) Improve communication and information flow between the ATP and industry on product development.
- d) Ensure that requirements for improved access, infrastructure and visitor management are taken into account in the development of all products.

#### **8.2.4.3. Key Targets**

Establish active product development networks by December 2007.

Identify opportunities for new visitor attractions and activities, and develop plans for delivering these by 2009.

Develop Plans for improving roadside amenities, foot/cycle access and access to key monuments/archaeological features by March 2008.

#### **8.2.5. Culture, Events and Sport**

Events and facilities can make an important contribution to year-round tourism and can draw people into an area to participate in specific activities – helping to market the Highlands and meet visitor expectations during their stay. Winter sports in particular can make a significant contribution to extending the tourist season in many parts of the region and events such as shinty matches and Highland Games can help attract visitors to remoter parts of the region.

Hi-Arts support and promote a comprehensive programme of cultural and arts facilities and events, which are a key part of the range of activities for visitors when they arrive, increasing satisfaction and enhancing the authenticity of the experience by demonstrating the distinctiveness of an area. Traditional music has a particularly strong role to play in this, including both the large scale events and the more informal performances held in local venues, and the challenge is to provide support to musicians and venues so that they can provide year-round entertainment in all suitable locations. The Feisean movement will continue to have a key role here.

However, further work is required to improve information and access to these activities. Also, many events are created and organised by local trade groups but it can be difficult for voluntary groups to develop these to a scale where they will attract or offer high enough quality to attract sufficient visitors. Even though the quality of an event may be high, we should try to avoid losing its authenticity. Arts and cultural programmes in particular, could be presented better to visitors through VisitScotland marketing activities. Many local events may be organised with a short lead-in time, making it difficult to maximise their economic benefit through advance promotion, but much can be done to build on the programmes being developed for the 2007 Scottish Year of Highland Culture and key bodies are already collaborating on this. Substantial additional resources are being applied to 2007, and there is a risk that the abrupt withdrawal of these resources in 2008 may have a significant impact on many Highland organisations. Thought needs to be given to arrangements for supporting

cultural activities/events post 2007, and the evaluation of the Highland 2007 programme and the implementation of any lessons learned, should ensure that it leaves a lasting legacy.

Gaelic, heritage and genealogy services and facilities can position themselves to meet the growing numbers of visitors who travel to the Highlands to pursue these interests. Homecoming Scotland in 2009 will be a central driver for tourism related activity in the lead up to and during the year, building on the interest in ancestral tourism in the Highlands. Again, there is scope to deliver a more holistic holiday experience, with a range of operators working together to provide a package of experiences, including taster sessions. Innovative approaches should be explored, including the option to produce menus of activities and experiences for people to choose from throughout the year and providing linkages to events and attractions in other parts of the country.

#### **8.2.5.1. Our Strategic Objectives**

To enhance the experience of visitors to the Highlands by ensuring that they have easy access to a wide range of facilities and experiences – i.e. cultural, arts, genealogy, sport, outdoor activities and events.

#### **8.2.5.2. Our Priorities**

- a) Improve the promotion of arts, music and other cultural events to visitors to the Highlands.
- b) Develop and promote Gaelic, heritage and genealogy facilities and services throughout the Highlands.
- c) Further develop and promote outdoor/sport niches, including audience building in key Highland sporting events (e.g. shinty, Highland Games)

#### **8.2.5.3. Key Targets**

Identify possible improvements to current programmes and put in place mechanisms to deliver them, by 2008.

Put in place opportunities to experience local heritage, including Gaelic where this has cultural roots, in every part of the Highlands, by 2010.

Further develop single portal access to Gaelic and genealogy facilities, services and attractions across the Highlands by 2008, building on existing initiatives and linking to similar services in the rest of Scotland.

Increase uptake, by 20%, of community funding and support mechanisms to develop and promote events, by 2009.

Extend the range of sporting and outdoor activities, events and facilities available to visitors by 20% by 2015.

#### **8.2.6. E-Business**

Technology is transforming the way we all do business, allowing operators to gather and use information more efficiently and to reach their markets more effectively. We need to constantly update our knowledge and make use of new technologies, using the most appropriate media to access new markets and to project an image of a modern and vibrant destination. Visitors should be able to access information and make a booking on a 24-hour basis. Existing gaps in the required infrastructure are being addressed but we must ensure that this is done comprehensively.

#### **8.2.6.1. Our Strategic Objectives**

To help tourism businesses to be more competitive, accessible and better at marketing and communication and assist them to maximise their development opportunities based on the latest tourism trends.

#### **8.2.6.2. Our Priorities**

- a) Ensure that all tourism operators in the Highlands use appropriate technology to gather and process information effectively.
- b) Improve small business understanding of the opportunities offered by vs.com

#### **8.2.6.3. Key Targets**

By 2010, all tourism businesses in the Highlands to be using e-technology to maximise sales and improve the visitor experience (from internet booking to e-marketing to hand-held e-guides).

By 2010, all funded events/activities to provide on-line booking facilities.

### **8.2.7. Access and Transport**

Transport into and within the Highlands is a key issue for all visitors to the area. We need to address the perceptions (real or otherwise) of the inaccessibility of the area, improve the experience on all types of journey, and promote the journey as part of the holiday experience, by improving infrastructure and signage and by highlighting things to see and do along the way.

Due to the geography, topography and rural nature of the Highlands, many visitors will continue to travel by car and we must ensure that their journey is of the highest quality and that opportunities to enhance their experience are taken. Roads maintenance and upgrades, well signposted facilities and services and plenty of opportunities to stop and enjoy the views should all be priorities. Opportunities to increase and improve direct access to the area should be taken, improving ease of access and value for money.

However, travel by car and plane have huge impacts on the environment and a prime objective should be to increase visitors' use of public transport and alternative methods of travel. We therefore need to improve the infrastructure, promote integrated services and ticketing and ensure that there is comprehensive, accurate and up-to-date information available at all points of travel. We need better quality of service provision, including on-board services and a consistency of standard across all areas and modes of transport. This should include the provision of locally produced food on trains and provision of information on buses and trains about the local area and its attraction. We must promote a more user friendly approach in all private sector operators.

Alternative modes of transport such as walking and cycling should also be promoted; this will require further development of infrastructure and associated facilities and provision of appropriate information and signage. All activities should fit with the Scottish Landscape Forum's Strategy.

#### **8.2.7.1. Our Strategic Objectives**

To ensure that the Highlands are easily accessible from the rest of Scotland and from other countries, and easy to travel around.

#### **8.2.7.2. Our Priorities**

- a) Ensure that the needs of tourism are recognised in the Highland Regional Transport Strategy and Plan.
- b) Ensure that tourism is a key factor in delivering integrated public transport services.
- c) Enhance the visitor experience by improving information provision and by integration of services and information on local facilities, for example, community transport and post buses.
- d) Improve integration of bus and ferry schedules and timetables.
- e) Improve existing services into and around the Highlands, including routes into and between Inverness Airport and regional airports such as Skye and Wick, and fast rail links to the Central Belt and beyond.
- f) Improve the road journey experience.
- g) Promote and support access networks for walkers and cyclists.

#### **8.2.7.3. Key targets**

Identify opportunities for improving and promoting public transport and providing travel information, specifically with visitors in mind, by March 2007.

Make comprehensive, accurate and up-to-date information available at all local points of travel by October 2007.

Identify any gaps and weaknesses in existing timetables and scope options for improving joint timetabling arrangements by December 2007.

Continue to press for improved air and rail routes into and within the Highlands, and for the development of new/improved bus routes outwith the main transport nodes.

### **8.2.8. Natural Environment**

As outlined earlier, the environment and natural heritage is central to the visitor appeal of the Highlands and therefore it underpins the tourism industry. A key test of the success of this Plan will be the extent to which it can sponsor development of tourism in the Highlands that is based upon the best of the region's natural and cultural heritage whilst at the same time safeguarding and enhancing these assets.

There is still further potential to promote the outstanding scenery and natural heritage of the Highlands, not just the well-known features that present such iconic images of Scotland, such as the Cuillins, Ben Nevis, the Cairngorms and Loch Ness, but also the coastal scenery and wildlife of the far North and West and the combination of mountain, moorland and more fertile coastal plains of the east coast. There is scope to develop a co-ordinated programme of events, facilities and interpretation focusing on the natural heritage across the Highlands, and to further develop heritage networks and local walks. Every opportunity should be taken to protect and enhance the high quality of the natural environment and landscapes of the Highlands, through integrated planning and management of natural resources, sensitive siting and design of new developments and through ensuring that the value of the natural heritage to the local economy along with its intrinsic value, are fully recognised by everyone living and working in the area. Work undertaken under this strategy must complement existing landscape strategies and the wider rural development agenda. Real efforts must therefore be made to ensure that efforts to grow tourism complement and underpin policies that protect our natural heritage and landscapes. Opportunities exist to promote the Highlands as a green destination, developing improved partnerships to emphasise and enhance the high quality of the Highland environment.

#### **8.2.8.1. Our Strategic Objectives**

To position the natural heritage as the key Highland "product" that underpins the visitor experience

#### **8.2.8.2. Our Priorities**

- a) Raise awareness in residents of the importance of the natural environment in the Highlands to tourism and its importance in underpinning the visitor experience.
- b) Promote the quality and diversity of the natural heritage of the Highlands.
- c) Ensure that the high quality of the natural heritage, landscapes and environment of the Highlands are maintained as a priority.

#### **8.2.8.3. Key Targets**

Put in place awareness-raising programme on the natural/cultural heritage of the Highlands, aimed at industry, communities and agencies, by 2008.

Firmly establish the Highlands as a Green Destination by 2010.

## **8.3. Marketing Your Product**

### **8.3.1. Context**

We need to use up-to-date information on our key markets to communicate with customers, raise their awareness and desire to visit, and convince them to commit to making the trip. The environment and communities of the Highlands, linked to its rich cultural heritage and activities on offer, are significant elements of the brand for this area.

### **8.3.2. Issues and strategic opportunities**

There are opportunities to develop tourism outwith the traditional peak periods, including the spring and early summer market, although the main summer holiday period is also important. The short breaks market will continue to be an important element and offers opportunities for further growth. Business Tourism potentially has a significant role to play in extending the season, through organised events and promoting services outwith the key season and by persuading business tourists to "come early and stay late" or to return again as tourists.

Further opportunities exist for VisitScotland to raise awareness of the Highlands' key strengths that fit with the national product portfolio and to undertake targeted local activity, for example eco-tourism, including wildlife tourism; outdoor and specialist activities; heritage attractions; ancestral tourism; cultural heritage; whisky; golf; events and festivals etc.

Maximising the lifetime value from existing customers is also important, encouraging visitors to stay longer and return more frequently, by offering them a "whole" experience. Local businesses need to continue to focus on providing a high-quality product that exceeds expectations and encourages repeat visits and referrals, as well

as encouraging a taste of new experiences. Adding value through collaborative working between accommodation and activity providers and joint marketing initiatives, are an essential part of this product development and placement, in order to enable us to compete successfully in global markets. Making best use of Information Technology will be key to our success in this.

### **8.3.3. Our Strategic Objectives**

To develop further and use the brand for the Highlands to attract new visitors and maintain a high level of repeat visitors.

To develop better joint working and collaboration to develop the product and manage the visitor experience, making it easier for visitors to access and book accommodation and activities and to find out about attractions.

To increase the volume and value of business tourism in Scotland through improving the Highlands' competitiveness and communicating the quality and diversity of the Highlands as a convention, meeting and incentive destination.

### **8.3.4. Our priorities**

a) Market the uniqueness and diversity of the landscape, natural heritage and communities of the Highlands and promote the distinct character of individual areas.

b) Ensure that Highland products are well represented within VisitScotland's product portfolio of marketing activity.

c) Encourage more effective joint marketing initiatives by the industry, and marketing advice to the industry and relevant partners, including improving awareness of access to VisitScotland's Challenge Fund

d) Ensure that visitors to the Highlands can readily access high-quality up-to-date information on where to stay and what to see and do.

### **8.3.5. Key Targets**

Increase the number of local marketing groups that are working together, including cross-border collaboration.

Strengthen the promotion of the area as a Green Destination.

Ensure that business tourism contributes to at least 25% of the targeted 50% increase in the value of tourism to the Scottish economy by 2015.

## **8.4. Being Sustainable**

### **8.4.1. Context**

Safeguarding the environment of the Highlands, whilst growing a successful tourism industry, is central to the Highlands' contribution to the national goal of being the most sustainable destination in Europe by 2015. The key aims for sustainable tourism in Scotland are:

- A more even spread of visitors throughout the year
- More tourism businesses actively enhancing and protecting the environment, e.g. by joining the Green Tourism Business Scheme
- Greater investment in tourism people and skills
- A better integrated quality tourism product that meet visitors' demands and expectations and encourages them to stay longer and spend more
- A clearer understanding of tourism's impacts
- Greater involvement of communities in tourism planning, development and marketing
- Greater use by visitors of Scotland's public transport system

The principle and practice of sustainability should therefore underpin all the objectives, priorities and actions being delivered by this Tourism Plan. Many of the above aims are taken into account by the priorities outlined in previous sections of the Strategy and can be delivered by many of the actions in the attached Action Plan. However, there is a real need to maintain sustainability as a specific and intrinsic goal, which has its own action plan and monitoring framework – keeping a clear focus on the “green” element of sustainability.

#### 8.4.2. Issues and strategic opportunities

The growing awareness of environmental issues and an increasing number of people who take into account environmental factors in consumer decisions presents both challenges and opportunities for operators, to promote themselves as green businesses and to capitalise on the high-quality environment in the Highlands. There is a real opportunity to strengthen the promotion of products that underpin the status of the Highlands as a Green Destination (i.e. adhering to the principles of ethical marketing; sustainable product development and protection/enhancement of the natural/built heritage). Also to raise awareness and understanding, in both visitors and residents, of the concept of sustainable tourism and of the economic and social benefits of greener working practices. Encouraging the use of public transport, promoting greater involvement of communities in tourism issues and increasing the position of tourism as a significant consideration in determining development applications are also important. Measures for mitigating tourism related sustainability issues should involve local communities and should link to existing sustainability programmes for the Highlands.

#### 8.4.3. Our Strategic Objectives

To ensure that tourism in the Highlands is sustainable and that all activities aimed at growing tourism also protect the high natural heritage and environmental qualities of the area.

#### 8.4.4. Our Priorities

- a) Use sound environmental, economic and socially sustainable principles to underpin the planning, development and delivery of all tourism activities.
- b) Increase the length of the tourist season,
- c) Disperse visitors throughout the Highlands, using gateway hubs to signpost visitors to remote rural areas.
- d) Raise awareness (locals and visitors) of sustainability issues and develop opportunities to demonstrate our environmental awareness to visitors.
- e) Promote greater use by visitors of public transport in the Highlands, where possible.
- f) Use the quality of the natural heritage and future quality of life as key drivers and messages in regional sustainability and planning.

#### 8.4.5. Key Targets

Prepare an overview of tourism related sustainability impacts and mitigation measures by the end of 2007.

100% of businesses registered with VisitScotland to participate in Green Tourism Business Scheme by 2015.

Significantly increase the numbers of visitors to the Highlands using public transport, by 2010.

By 2010, increase the number and range of facilities and attractions that have increased their season, by 20%

## 9. MONITORING, EVALUATION AND REVIEW

Monitoring the implementation of the Plan is a further task for the Area Tourism Partnership, to ensure that progress is being made and that common objectives are achieved. Key activities and outputs will be monitored regularly by each lead body; the methodology and frequency of information collection and collation will be determined separately for each agreed action. The ATP will conduct a full annual review of both the delivery and impact of the Plan. It will focus on key outcomes, and this information will form the basis of any reporting to the Scottish Executive and to key stakeholders. The Strategy and Plan will also be reviewed for their continuing relevance – they are both intended to be “live” and working documents, although the broad aims and objectives are not expected to change significantly over the period of the Plan. Trade Associations and public sector partners will also be invited to provide more detailed presentations to the ATP on occasion, on specific projects. Progress on the delivery of any local plans will be monitored separately and local partners will be encouraged to report back to the ATP on a regular basis.

The Strategy will be updated in 2015 and the Plan in 2009. A broad monitoring framework has been produced but detailed work programmes and monitoring plans will be prepared as required.