Outer Hebrides ATP

Note of Strategy Development Workshop, 30th Sep 2008, North Uist

<u>**Where is tourism in the Outer Hebrides now?** Define key strengths and weaknesses:</u>

<u>**Strengths:**</u>

- **Gaelic** & wider cultural heritage of the Outer Hebrides
- Distance from the mainland – maybe not physical distance but cultural distances form the visitor experience on the mainland or day to day life – the **contrast**!
- **Authenticity** of visitor experience
- **Spiritual**
- **Environment –** exceptional quality & very distinctive
- **Geography** – each island gives a different experience and the geography makes it easy for visitors to holiday on 1, 2 or more islands during their break.
- Customer feedback points to four main areas:
    - Coming to visit specific **events or attractions** – HCF / St Kilda etc
    - Always fancied visiting the OH – **aspirational**
    - Island collecting / bagging
    - Accommodation / experience as the destination – i.e. have read about Blue Reef – which makes them want to visit Harris and stay there – the power of **positive PR / market positioning**.
- **Warm welcome**
- **Night sky** is exceptional – no light pollution
- **Amount and variety to see & do** – visitors always say they never knew there was so much to do – they wished they had another couple of days.
- **Accessibility** of natural environment
- **Quality of local produce** (food & drink)
- **History & Archaeology –** world class
- **Wildlife –** world class
- **Fishing**
- **Golf**
- **Ancestry & genealogy**
- **Adventure & extreme sports**
- **Crofting**

<u>**Weaknesses:**</u>

- **Quantity & quality** of accommodation – quantity in peak months and quality in general
- Lack of access to **local produce**
- <u>**Seasonality**</u>
- Giving visitors access to **our culture** when they are in the islands
- **Access** to wildlife tourism – a ranger can't afford to be a ranger just for 2 months work in the summer – seasonality. Massive untapped potential in wildlife tourism.
- **Local information** – visitors can be 100 metres from one of the most spectacular beeches and have no idea it is there or how to access it. It's a bit about signage, car parking and leaflets.
- Too many entry points to the OH for visitors each giving a different visit experience?
- Weather
- **Arrival signage / welcome** in general – could we have Gaelic welcome at the airports as well as the ferries?
- **Eating out & retail –** wider service experience can often be poor and quality of retail merchandise and access to local crafts etc.
- **Sunday** – visitors do comment on lack of things to do and if they have been on a short break may feel short changed by a day.
- Leaflet & timetable distribution for services on the islands is poor

- Litter

Barriers:

- **Seasonality** – do we know what out of season capacity is? Maybe VS and OHTIA can carry out a short survey of accommodation provider to try and measure what the surplus capacity might be?
- **Fuel costs** – v. expensive in islands – will visitors in the future consider travel to OH by public transport and using PT when on holiday? Connections / infrastructure on mainland?
- **Perception that OH is not a short breaks market** – as the trend is towards short breaks this market positioning needs to be changed to grow tourism in the OH.
- Is accommodation in the OH set up to **cater for the short breaks market** – particularly self catering?
- Packages
- **Better coordination of events** – longer lead in times so they can be advertised well in advance and better spread rather than just holding events in the summer months.
- **Current economic climate** – lack of investment along with a risky environment may well see developments put on hold in the short term?

Where do we want to get to? Volume / value targets taking the strategy up to 2015.

- Potential for growth is high as there are currently many missed opportunities.
- Community commitment to tourism
- Focus should be on extending the season – don't need anymore visitors during the summer months but would like to grow quantity of visitors in spring and autumn
- Visitors from 2006 season – March – October 171,137 & Nov – Feb 24,629 total 195,766 – so should grow both volume and revenues but focus the growth in volume in the shoulder periods.
- **Grow volume by 30% by 2015** – to 255,000 visitors
- **Grow value by 50% by 2015** – to £260 per visit
- These **targets must be flexible** and reviewed on a regular basis as setting unachievable targets in the currently climate would not be helpful to business confidence or corporate reputation of the ATP group.

How do we get to where we want to be? 5 drivers for growth:

1. Capacity Utilisation
2. Cross Selling
3. Market Positioning – Quality
4. Incremental Marketing
5. Capital Investment

Areas of potential activity submitted in advance included:

- Carbon Neutral
- Who Cares Wins
- Tourism Training
- Increase in serviced beds
- OHTIA
- RET Marketing

Points discussed:

- **Business Tourism** – business tourism (conference and incentive market) can be a great out of season market – is this an area the OH should be developing?
- **Niche markets** – should efforts be focused on further development of the niche areas that are the key strengths of the Outer Hebrides – wildlife / archaeology etc?
- **Who Cares Wins** – the project is going to fold with no further funding forthcoming from HIE and CnES not a position to commit any money to it? Over 2.5 year period HIE have invested over £80k and the project is coming to the end of that public support. Strong voices from the industry to see the WCW continue. CnES understands the importance of tourism to the OH economy but are unable to commit in the current climate however

there are number of groups around the table that could explore this including SNH and CNAG?

- **Seasonality** – the biggest barrier of all, need 2 – 4 compelling reasons for visitor to come to OH out of season.
    - **Spring / Autumn Festivals** – at fortnight festival in both shoulder periods, with a joint project between industry and agencies, maybe with LEADER support – set up a working group to bring this forward.
    - **The spring / autumn migration of birds** across the OH is world class and gives a good spread of visitors throughout OH. There is a VisitScotland Wildlife grading scheme in place - need other infrastructure? PR opportunities such as BBC spring / autumn watch – benefits of TV exposure. Links with RSPB. Target 2010?
    - **Archaeological sites** across the OH are also world class – what about channel 4 Timeteam?
    - Calmac are always looking for content for the e-newsletters – can't promote individual businesses but looking for things to do.
- **VisitHebrides.com –** contains substantial niche information, a sub group of the ATP could come together to revisit this site, as although it was ground breaking in it's development it has not had any major investment for a number of years and is falling behind. CnES really keen to see this pulled forward.
- **HIAL –** the group would like to see Gaelic welcomes at all airports – helping to provide the sense of place and creating a better welcome at entry points.
- **Mod –** next mod maybe scheduled in the OH for 2011.
- **St Kilda Centre –** CnES working group now in place to progress this.
- **Harris Tweed Centre**
- **Events** - out with the main season – money to pay performers?
- **Festivals** – food / walking etc.
- **Strengthening links between tourism industry and food producers**
- **Cycle racks** on buses
- **Survey out of season capacity** – OHTIA & VS
- **Target short breaks market** – reposition OH as short breaks destination, what are the opportunities with Flybe? Are we providing then with information for their in-flight magazines and destination guides?
- **Romantic market & Spring / Autumn weddings** – special occasions happen all year round. Weddings, which bring groups of 20-120. While large weddings in the middle of the season don't need to be encouraged, small ones can be excellent, and large ones in low season are fantastic!
- **Quality** – difference in perception of lack of service accommodation but hotel feedback that they are struggling to fill rooms. What can we do? All hotels in N Uits up for sale – similar situation to Barra last year.
- **Carbon neutral** – possible ERDF funding for pilot available via VS – awaiting more information. Green destination promotion could be carried out as type of aircraft that fly to OH are very green, Flybe are testing and will widely publish emissions levels on all their aircraft.
- **OHTIA** – ongoing funding from CnES £5k per year and money from WITB when it was merged with VS – but funds are running low and with such a low subscription rate of between £20 & £25 per year it is not financing itself. For every meeting there is not just the missed business opportunity cost each industry rep suffers but there is ongoing cost of travel and accommodation for each meeting.