

OUTER HEBRIDES

AREA TOURISM PARTNERSHIP PLAN

APRIL 2006 – MARCH 2009

1. INTRODUCTION

AREA TOURISM PARTNERSHIP PLAN

This Area Tourism Partnership Plan for the Outer Hebrides will have the emphasis on action plans and delivery will:

- be aligned with the national tourism strategy and local strategies
- contain clear and measurable targets
- reflect local needs and priorities
- have a 3-year life span from April 2006 to March 2009

The key to success of the plan will be:

- Formal agreement by the tourism industry and all involved agencies
- Action Plans that are clearly linked to aims and objectives
- Ownership of each Action Plan
- Targets that are measurable and achievable
- Plan delivery that is timebound
- Formal and regular monitoring procedure on a quarterly basis.

AREA TOURISM PARTNERSHIP GROUP

The Area Tourism Partnership Group that will agree, review and monitor the implementation of the plan is comprised as follows:

Outer Hebrides Tourism Industry Association	– 5 representatives
VisitScotland	– 2 representatives
Comhairle nan Eilean Siar	– 2 representatives
Western Isles Enterprise	– 2 representatives

PURPOSE

To maximise the benefits of tourism for the people of the Outer Hebrides, by developing a competitive industry, focussed on quality and customer service, that is economically, socially and environmentally sustainable and that builds on its history, culture, environment and the hospitality of its people.

VISION

Tourism in the Outer Hebrides will provide a world-class product, which will deliver consistently high quality in terms of facilities, customer service, career opportunities and income levels. It will be market-led and responsive to customer demands.

2. AIMS and OBJECTIVES

- 2.1. To conduct required **RESEARCH** to inform on level of visitor satisfaction, to measure the success of tourism in terms of volume and value worth to the local economy, and to maximise development opportunities based on the latest tourism trends.
- 2.2. To ensure that there is consistent **BRANDING & MARKETING** using the Outer Hebrides brand image to attract new visitors and to maintain a high level of repeat business.
- 2.3. To develop and improve **CUSTOMER SERVICE** to a level of excellence in all businesses interacting with the visitor, and instil a pride and passion for the islands throughout the local communities.

- 2.4. To enhance the **PRODUCT KNOWLEDGE** of the Outer Hebrides in local businesses and in schools and communities to improve the welcome and quality of the visitor experience.
- 2.5. To develop tourism **ACCOMMODATION** capacity and quality provision throughout the Outer Hebrides to ensure the long-term capability to satisfy consumer demand across all accommodation categories.
- 2.6. To enhance areas of **PRODUCT DEVELOPMENT** to provide a better tourism infrastructure, more events, attractions and activities for the visitor, and to improve the attractiveness of the islands so as to deliver the qualities of the projected brand image.
- 2.7. To improve the **QUALITY, SKILLS & BUSINESS DEVELOPMENT** of all tourism businesses to increase professionalism and maximise the use of technology to improve business planning and profitability.

3. TARGETS

- 3.1. Grow the **VALUE OF TOURISM** by 50% by 2015. This equates to annual growth in value of 4% per annum incorporating a target of increased volume of visitors to grow by 20% over this period. The remaining growth to be generated from increased spend per head including travel.
- 3.2. Increase the number and quality of **TOURISM JOBS** by 3% by 2009
- 3.3. Extend average **LENGTH OF STAY** by .5 days for main holiday by 2009
- 3.4. Increase average **SPEND PER HEAD** by £5 by 2009
- 3.5. Increase **QUALITY ASSURED** accommodation tourism businesses to 90% of all operating accommodation businesses by 2009
- 3.6. All tourism businesses to be utilising **E-TECHNOLOGY** to maximise sales and improve the visitor experience by 2009
- 3.7. Raise awareness of **GREEN TOURISM** and double membership of the Green Tourism Business Scheme by 2009

4. STRATEGIC CONTEXT

The tourism industry, globally and nationally continues to grow, showing remarkable resilience by bouncing back from a number of potentially major setbacks over the last five years, including an increase in global terrorism and fluctuations in the economies of some of our main markets to retain its position as one of the most significant contributors to Scotland's economy and well-being.

Some of these crises have focused attention on the importance of a sustainable tourism industry to Scotland and highlighted an influence which extends well beyond the performance of businesses directly operating within the sector. The industry's ability to work together to deal with challenges and adapt to changing consumer trends and economic factors has contributed to it being increasingly recognised as a mainstream player in economic development. Tourism is acknowledged as being vital to the well-being of many of our communities, providing direct and indirect employment where there is often few other opportunities and encouraging community pride.

Regionally, there has been good progress in putting in place some of the building blocks of a successful and sustainable tourism industry, many of which were outlined in the previous Area Tourism Strategy for the period from 2001-2005. There is still scope for significant growth and the consensus through the consultation on this action plan has been that this area can contribute to achieving the ambition for 50% growth that the Scottish Executive has set as a challenge to the tourism industry in Scotland. It can also play an important role in fulfilling the national vision which is:

“To make Scotland one of the world’s foremost visitor destinations by 2015.”

This Action Plan sets out some of the key issues that need to be addressed if this area is to maximise the benefit of national growth and contribute to achieving the national vision. It will only be achieved if all those who make up the industry take ownership and work together to implement the actions identified, acting as ambassadors to spread the message that Tourism is Everyone’s Business to the wider community. Nationally, it is set in the context of the National Framework for Tourism Change which in turn draws from Smart Successful Scotland and the Framework for Economic Development to ensure that there is a sound platform for the actions it sets out. Regionally and locally, it is set in the context of Community Plans and Local Economic Development Strategies and Action Plans, along with Structure and Local Development Plans. Primarily, however, it is based on the input from tourism industry businesses as well as the key agencies involved in developing and promoting tourism.

The Action Plan sets out the market context and then focuses on four themes for action. These are:

- Knowing Your Market – maximising availability and use of market intelligence
- Marketing & Promotion – targeting the markets with the highest likelihood of return
- Exceeding Visitors’ Expectations – providing the “wow” factor that encourages visitors to come again and recommend us to others through quality products, places and facilities which are attractive, innovative, authentic and distinctive along with top-class service.
- Being Sustainable – achieving growth in a way that balances the needs of the economy, communities and the environment.

Some of the projects that will be taken forward under the broader actions set out under the Aims & Objectives are included in Project Plans in the appendices to this document. These will be monitored and used to demonstrate that the investment which is being made in our area will grow tourism on a sustainable basis, bringing wealth and vitality to our area and also contribute towards the achievement of national tourism ambitions.

THE CHALLENGE

To meet the challenge of the 50% growth target, we will need a step change in the way we all do business, individually and together. All those involved in tourism must look to what they can do, creating Action Plans for their own business and their local area, based on the strategic guidance given in this document and on their own knowledge of local markets and product strengths. Above all, we must act as ambassadors to sell the message that tourism is everyone’s business to bring about the experience of a visit to our area that will make it a must-see/must-return destination.

5. THE MARKET CONTEXT

The Global Context

Internationally, tourism is growing and is on track for the World Tourism Organisation's forecast of 4-5% growth until 2020. However, there is huge competition, with over 200 countries offering a tourism product. VisitScotland research on some of the world's leading tourism destinations show that they:

- Offer a wide product base and good variety of holiday experiences which offer discovery and experience as key themes;
- Target growing consumer interest in outdoor activities, cities, culture, well-being and business tourism;
- Use native/traditional culture and heritage to differentiate themselves, and use special events to boost profile;
- Make heavy use of the internet for promotion;
- Use private/public partnerships to deliver key roles;
- Depend on domestic tourism as well as the international market, and campaign to encourage tourist friendly attitudes.

To compete globally, we must learn from this and consider how we can ensure our destination fits with this profile to join the world's leaders.

The Scottish Context

Much of the information available on visitors to Scotland is highly relevant to our area.

- The vast majority of trips to Scotland are from the UK. 44% of trips are made by Scottish visitors, 47% are from England and Wales and only 9% by overseas visitors. The UK leisure market is worth around £2.9 billion. It is increasingly a short break market (average stay - 3.6 days). There is still room for growth, as over half the population of England and Wales have never visited Scotland.
- Overseas markets are growing faster, however, and as overseas visitors stay longer (average stay 9.3 days) and spend more – 19% of the value of Scottish tourism from 9% of the trips – they are crucial to growth. North America is the biggest overseas market and is beginning to show signs of growth again. The European markets are growing most strongly, assisted by better direct air access and the Rosyth ferry. Germany remains the largest market, followed by France, but there is growing interest from Spain and the Scandinavian markets particularly Sweden. The overseas leisure market is worth around £0.73 billion.
- UK and overseas business tourism is worth around £1 billion.
- Research shows that the most important factors in choice of Scotland as a leisure destination are our scenery, natural environment, the number of things to see and do, and the friendly attitude of local people.

Other key findings area that:

- 96% of visitors had their expectations met or exceeded, and 97% were likely to recommend their holiday experience to other.
- The authenticity of the experience is vital
- The opportunity to interact with Scots is important, especially for North Americans.
- Common criticisms are the weather, prices/exchange rates and quality of accommodation and eating places.

Local Context

Tourism in the Outer Hebrides is built on the cornerstones of environment, culture, and heritage – a unique way of life in an internationally renowned natural environment. These elements in combination are a powerful attraction to visitors who enjoy relaxation away from the stresses of modern life. Main activities during their stay include Sightseeing, Walking, Photography, Beaches, Birdwatching, Flora and fauna, Museums and Visitor Centres, Historical Sites, Outdoor Sports & Cultural Activities.

Trends in the Outer Hebrides

Visitor numbers have risen to an estimated 180,000 visitors with direct expenditure of over £41 million, and tourism contribution to the local economy has risen to 15.6% of GDP.

The Outer Hebrides draws visitors from all over the world. Scotland (30%) and the remainder of the UK (45%) are the most important markets, followed by USA and Germany. However, approaching 25% of all visitors to the Outer Hebrides come from overseas markets.

On average visitors will stay 9 nights in the Western Isles, but there are significant variations depending on country of origin. Visitors to the Western Isles are predominantly from social groups ABC1, representing 80% of all visitors. This shows that the area is more popular with visitors over the age of 45 from the rest of the UK, and visitors in the age band 35-55 from Scotland. By comparison the Outer Hebrides are marginally more popular among younger visitors from overseas. Repeat visits are an important feature of tourism in the Outer Hebrides. Overseas holiday visitors are most likely to be on their first visit to the Western Isles. By comparison Scottish visitors, VFR and business visitors are quite likely to be repeat visitors.

Visitor Profile

Our typical consumers can be described as follows:

- Younger (under 45) overseas and older English (over 45) visitor
- ABC1
- Typically on main holiday, except Scots who are often on second holiday or short break
- Typical party size of just over 2
- Motivated by the natural environment (peace and quiet, remoteness, getting away from it all, scenery, nature, and to the cultural environment (Gaelic, crofting, way of life etc)
- Influenced by previous visits or knowledge, advice from friends and relatives, guide books, brochures, media and the Internet for overseas visitors
- Majority engage in low level walking, sightseeing and touring, photography, visiting beaches, archaeological sites, etc.
- Lower level of engagement in activities such as cycling, fishing, sailing, swimming, golf etc.
- Travels in own car or uses hire car
- Spends an average of £221 per person per trip, excluding cost of travel to the islands
- Trip exceeds expectations

Local Development Framework

Creating Communities of the Future

Creating Communities of the Future is the inter-agency regeneration strategy for the Outer Hebrides. That strategy identifies tourism as one of the six key economic drivers against which activity should be prioritised and seeks to articulate a vision for the development of tourism. The strategy states:

Tourism in the Outer Hebrides will provide a world-class product, clearly differentiated from the rest of Scotland and the UK. It will deliver consistently high quality in terms of service, career opportunities and income levels. It will be market-led and responsive to customer demands.

In support of these aspirations a range of high-level actions have been developed. These are as follows:

- put in place a new Area Tourism Partnership Plan with the aim of creating a world-class tourism product
- grow both the value of tourism and the number of jobs in the tourism sector
- develop niche market products in the areas of culture and the environment
- develop Lews Castle as a resource for the future
- develop the concept of “attractiveness of place”, through the regeneration of Stornoway and the upgrading of all island gateways
- develop and grow the range and quality of accommodation across all segments, with particular emphasis on hotels; hostels and student accommodation

Comhairle nan Eilean Siar / VisitScotland Annual Partnership Agreement

In March 2004, the Ministerial Group reviewing tourism in Scotland and its potential for growth declared a new challenge for the industry - to grow tourism revenue by 50% by 2015. The Ministerial Group's conclusions are summarised in the Ambitions for Growth:

- A customer-led approach to local services should be a priority.
- Private sector to contribute towards joint marketing activities
- Area Tourist Boards and VisitScotland to form an integrated tourism network
- Continuation of the support from local authorities for tourism at a local level
- Promotion and development of quality standards in line with visitors' expectations.

The Partnership Agreement outlines the range of services which will be provided to support the local tourism industry. It recognises the Comhairle's role in providing a range of services and infrastructure necessary for the support of a successful tourism destination. These include maintained roads and transportation infrastructure, sign posting, health and safety and environmental health services and licensing frameworks. The Agreement also recognises that the Comhairle will play a key role in managing and developing amenities which support tourism such as museums, galleries, theatres, parks, sporting facilities and festivals & events.

The local Partnership Agreement identified six key headline issues that will form the basis for Comhairle support to VisitScotland.

- **Marketing (Branding; Brochure; VisitHebrides.com)**
- **Tourist Information (TICs; Information points)**
- **Events Development**
- **Research**
- **Local Industry Association**
- **Quality Development**

FUTURE STRATEGY

Strategic Priorities

There is a significant level of complementarity across these documents (Creating Communities of the Future; Tourism Partnership Agreement and the Area Tourism Partnership Plan). The aspirations contained within them will form the basis for action to successfully develop tourism within the Outer Hebrides.

Through these strategies we can clearly state what we want tourism to achieve for the local economy.

Strategic Objective

- grow the value of tourism and the number of jobs in the tourism sector

In pursuance of the above strategic objective there will be a number of priorities and actions.

Marketing

- develop and to nurture a strong and successful brand for the Outer Hebrides
- ensure the continuation of distinctive area marketing through print (brochure) and the internet (VisitHebrides)
- develop appropriate niche marketing in order to target and attract appropriate niches
- undertake on-going research to ensure an appropriate understanding of the market and future trends

Visitor Servicing

- ensure that the Outer Hebrides has an effective Tourist Information Centre network, supported by an extensive series of Information Points

Product Development

- build on the success of events such as the Hebridean Celtic Festival by developing new and innovative cultural products
- support local amenities such as museums and galleries to become more visitor orientated
- support projects that seek to build on our environmental and archaeological heritage
- develop “attractiveness of place”, through the regeneration of Stornoway and the upgrading of all island gateways
- develop and grow the range and quality of accommodation across all segments, with particular emphasis on “high end” development
- support the concept of local food in local hotels and restaurants

Quality Development

- engage with tourism business sectors in a drive for better quality and value

- support increased investment in skills & training and clearly link support to facilities and infrastructure with people and skills development
- develop a “Quality Award” to recognise quality service in local businesses

Improved Understanding and Appreciation of Tourism

- work with businesses and key stakeholder groups to promote the value and importance of tourism to the Outer Hebrides

Organisational Development

- support the development of an Outer Hebrides Tourism Association

Seasonality and Dispersal

- support the development of niche market products

6. CHANGING CONSUMER TRENDS

We know from the research outlined previously that our visitors like what we offer them. However, this is a time of rapid and constant change in consumer markets and we must be aware of some of the current and longer term trends which will impact on tourism in the local area as well as nationally and internationally.

Current Trends:

- Today’s travellers want:
 - customised and flexible travel to a destination within 3 hours travel time;
 - special interest holidays and special experiences;
 - an authentic experience;
 - good value for money.
- There is an increasing tendency towards late booking and a strong trend towards shorter breaks
- Visitors often want more than one experience in a trip

Future Demand

Trends indicate a number of areas where demand is growing, including:

- Interest in good health, leading to a demand for activity breaks
- Breaks which offer a personal reward or well-being experience
- Extended education, with more demand for history and culture-related holidays.
- Green tourism, with a growing green consumer base.

Tourism in 2015

Scenario planning has painted a picture of what Scottish tourism could look like in 2015, based on some of these trends:

- There will be a strong focus on leisure short-break tourism, but business tourism will also be a strong growth sector.
- Competition for visitors will be stiff and easy booking and access will be vital.
- Visitors will expect a warm welcome and can-do attitude wherever they go.
- Visitors will want self-discovery and chances to try new things.

- Visitors will be even more sophisticated, with an interest in culture and the arts.
- There will be growth opportunities from the UK market, but the strongest market increase is likely to come from the overseas leisure market, predominantly from Europe and the Eastern US and Canada, but also from further afield.
- Population changes will mean more older visitors.

7. KEY THEMES

7.1. Knowing Your Market

Understanding the marketplace is vital to any business seeking to sell goods, products or services. We need to know who is most likely to buy, how they want to do business and what they are really looking for if we are to become more competitive. Tourism operates in a climate of rapid change in trends and developments, creating the need to constantly update knowledge and adapt.

The Issues

- To grow tourism, we need to understand who our customers are and what they are looking for in order to be able to deliver a product which exceeds their expectations. We also need to be able to measure the tourism industry's performance more effectively to see if the actions are working.
- There is a wealth of information on consumer trends and specific markets, and proposals to establish a Tourism Research Network will ensure this is kept up to date and reflects the rapid changes in the consumer market place. However, if we are to compete globally, we must overcome perceptions of local competition and get better at gathering and sharing one of the greatest potential sources of market intelligence - the businesses that monitor performance and gather feedback constantly from customers.
- There is also a pressing need to make more use of this information in planning investment in new or improved tourism products, marketing and in general business operations to make sure that the product fits with the market's needs and expectations.

7.2. Marketing & Promotion

Market intelligence identifies the key markets for our tourism product and how they want to buy. This knowledge has to be put to use to communicate with customers, raise their awareness and desire to visit, and provide the information they are looking for to convince them to decide to visit.

The Issues

- There is a strong brand being developed for the area of the Outer Hebrides. This brand must be consistently used in all promotional opportunities by tourism businesses and operators and agencies involved in tourism.
- The short breaks market continues to be a crucial element and offers opportunities for further growth, particularly to develop tourism outwith the traditional holiday periods. However, there is also a need to retain current strong main season demand. Continued promotion to attract new customers in both these markets is required.

- The area also has a number of major product strengths that fit with the national product portfolio and can be used in campaigns targeted at specific niche markets. These include:
 - ✧ Eco-tourism, including wildlife tourism
 - ✧ Activities, including walking and cycling
 - ✧ Ancestral Tourism
 - ✧ Freedom Breaks
 - ✧ Health & well-being
 - ✧ Golf
 - ✧ Sailing
 - ✧ Heritage attractions
 - ✧ Cultural Heritage
 - ✧ Events & Festivals
- The key focus must be on maximising the yield from existing customers by
 - Focussing on encouraging customers to stay longer and more frequently by offering a “whole” experience.
 - Providing a product of a quality that exceeds expectations and encourages repeat visits and referrals.
 - Targeting promotional campaigns at existing customers to encourage repeat visits.
- Investment in marketing must be recognised as an essential element of individual business operations and plans for new capital or infrastructure development. However, to compete in a global market more must be done to work collaboratively and maximise the benefits of joint marketing.

7.3. Exceeding Visitor’s Expectations

The 50% growth target is based on only a 20% increasing in the number of visitor trips brought about through our marketing efforts and the basic quality and range of our product. The majority of growth potential lies in providing the places, facilities and service that make up an experience that will make visitors want to stay longer, spend more and recommend others to come. We cannot stand still, but must use the knowledge we have of our target markets to guide investment in creating the experience which will exceed their expectations and ensure there are no weak links in the chain.

Quality of Visitor Experience

The Issues

- There are many examples of outstanding quality in this area, both in businesses and in our natural, cultural and built heritage. However, the visitors we aim to attract and retain are looking for a total quality experience, making it essential that there is consistency in all elements of the visit.
- The need to improve orientation and information provision to increase visitor satisfaction and dispersal, leading to longer stays, repeat visits and referrals.
- To surprise and delight our visitors, we all need to have enough Pride and Passion in what we have to offer, to properly care for it and to give more than what are the expected levels of product information. This extends to everyone who can have an influence on visitors’ perceptions of our area - people who live here and all those who work here.
- We also need to work together on a collaborative basis to overcome perceptions of local competition and compete in a national and global market

People and Skills

The Issues

- Much good work has been done, particularly through the strengthened presence of Springboard Scotland in many areas, to raise the profile of career opportunities in tourism. However, there are still many negative perceptions of working in tourism and the service industry in general which combined with decreasing labour availability and a lack of affordable housing make it increasingly difficult for tourism employers to find staff.
- Some of the negative perceptions are based on the reality of low pay and poor working conditions. Greater recognition of the link between better employment practices and increased productivity is required.
- In many cases, employers are turning to the large pool of available labour from overseas, notably Eastern Europe. While migrant workers are often able and willing to provide good service, this gives rise to issues of reducing the authenticity of the visit and at times, language difficulties.
- A transient workforce and high turnover of staff mean that some businesses see little incentive in investing in training and developing staff who may shortly move on. Staff shortages, operational pressures, the perceived cost and inconsistencies in the availability of appropriate open training programmes in local areas combine to discourage businesses from enabling staff to participate in training. Owner operators are also affected by these issues.
- This is made worse by the difficulties smaller businesses face in taking a strategic view of training and development needs within wider business development plans. There needs to be a better understanding of the business benefits of training.
- People can come into the industry at all levels with little or no qualifications or experience in tourism. At some levels, this can be addressed through workplace training and development. At more senior levels, particularly at owner/operator level, it is more difficult to address this which can have serious impacts on business performance and the quality of the visitor experience.
- Staff coming into the industry often lack the key skills required, particularly the softer skills, as the training provided does not always reflect industry needs. There is a particular need to develop a service ethos among new recruits and existing employees.
- Product knowledge is vital to offering a “whole” and authentic visitor experience, contributing to encouraging longer stays and repeat visits, as well as increasing visitor satisfaction. It must be a core part of training for all those coming into contact with visitors.

Innovation and Product Development

The Issues

- We have a strong core product, but our customers are constantly looking for something new and a unique experience. We need to innovate to develop new products that reflect market demand and allow us to extend the tourism season and grow as a year-round destination, but also to enhance existing ones to stay in line with changing consumer trends.
- In many key locations, we do not currently have the accommodation capacity for significant growth in our target markets. Without placing pressure on the scenic qualities that are the main attraction of our area, additional accommodation capacity potential must be identified and efforts made to encourage local and inward investment.

Culture, Events and Sport

The Issues

- Culture, sporting and other events are an important means of drawing people to the area, and can make a major contribution to developing all-year round tourism. There have been some notable successes in event development in the area, particularly the Hebridean Celtic Festival, but there is potential for additional event development.
- Events are often organised with short lead in times making it difficult to maximise their economic benefit through advance promotion so better co-ordination and planning of events is necessary.
- Events are also a key part of the range of activities for visitors when they arrive, increasing satisfaction and often enhancing the cultural distinctiveness of an area.
- 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 for today's visitors.

E-Business

The Issues

- Many homes in the UK now have Internet access and its use continues to grow across all our target markets. There is a need to have comprehensive and easily accessible information on-line and to allow on-line booking to meet customer's expectations.
- Technology is also transforming the way businesses are run, allowing operators to gather and process information much more effectively. Many businesses are not maximising the benefits of this.
- New media for reaching customers are constantly emerging and we must aim to constantly update our knowledge and make use of new technologies to project an image of a modern and vibrant destination.
- Visitscotland.com offers a reasonably priced and well-used route to market, but there is scope for further development, particularly to meet the needs of smaller businesses.
- There has been significant progress in developing the infrastructure necessary to maximise the use of technology, but there are still gaps to be addressed.

Access & Transport

The Issues

- Ease of access is a crucial factor in deciding on choice of destination. Opportunities to increase and improve direct access by air and sea to the area should be developed.
- Island destinations face particular challenges because of the time required to travel there and the cost and availability of ferries and air services. Infrastructure and service improvements are required to improve speed of access and value for money in travel costs.

7.4. Being Sustainable

The preceding sections take into account many of the seven key aims for sustainable tourism in Scotland which are:

- A more even spread of visitors throughout the year
- More tourism businesses actively enhancing and protecting the environment
- 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 and value for money of Scotland's public transport system

The actions set out so far focus largely on the economic and social aspects of these aims, but with the huge importance of our natural heritage and clean environment to tourism, there is also a need for a clearer focus on the "greener" side of sustainability.

The Issues

- There is a lack of understanding of the full concept of sustainable tourism and how this relates to other government targets
- There is growing consumer awareness of environmental issues and an increasing number of people are including environmental factors in consumer decisions.
- A real effort must be made to make business operations more environmentally friendly.
- There is a lack of awareness of the overall business benefits of introducing greener working practices, over and above creating a competitive advantage in the market place.
- Lack of information and barriers to going green can discourage businesses from aiming for the highest "green" standards available.