

TOURISM

TOPIC GROUP PAPER

MORAY FIRTH PARTNERSHIP

DRAFT

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1. Executive Summary

The task of gathering sources of information as an aid to identifying issues and opportunities proved an onerous one. However, sufficient background information on a very wide range of facilities, plans and strategies which directly impact on tourism in the Moray Firth area as designated by the Topic Group was obtained. This information together with the practical expertise of members from the Topic Group resulted in the identification of 12 issues and opportunities facing tourism. Many more than 12 issues were raised and discussed by the Group, however, it was felt that focusing on a limited number would be a more appropriate way forward if achievable outputs are to be realised.

The 12 issues and opportunities highlighted (in no order of priority) are:

1. Local operators/population's lack of awareness/knowledge of local facilities resulting in a lack of usage.
2. Business network links/Hotels marketing special package breaks eg. Bird watching, dolphin watching, coastal walks.
3. Develop/promote courses, encourage SHEP scheme in local schools.
4. Lack of Interpretive boards/signposting
5. Poor infrastructure/accessibility/public transport (especially airport links).
6. Weather.
7. Visitor needs/expectations not always met.
8. Look at Tourist Information Centre (TIC) opening hours/accessibility. Aberdeen is the only TIC open year round. Buckie, Cullen, Lossiemouth are permanently closed leaving only seasonal offices at Banff and Fraserburgh.
9. Litter problem/lack of public toilet provision.
10. Events led marketing. Draft events strategy. Extend season with festivals. Take advantage of national/regional promotions/initiatives and community initiatives which are more likely to achieve lottery support. Nairn TMP could be used as a model.
11. Improved development to include: Coastal Walks, Sailing Development, Wildlife (esp develop off-season), Caithness Harbour Trail linked with Grampian. [More extensive press familiarisation trips.]
12. To designate a tourist route/trail along the Moray Firth Coast and produce supporting promotional literature.

2. Map and Description of the Area the Tourism Topic Group has been investigating

The area considered by the Tourism Topic Group was that which lies between the A9/A96/A98 as indicated in yellow in the map below.

3. Tourism Topic Group Vision

"Raise the profile of the Moray Firth area among local residents and visitors as an area possessing an outstanding natural environment and a rich heritage which fulfils, in a sustainable way, its potential as a world class tourism destination."

4. Review of Information

Information sources:

- Links Golf Courses in the Area
- Cruise Liner Traffic
- Remote Beaches Accreditation Scheme
- Highlands of Scotland Tourism Strategy
- Tourism Action Plans: Caithness, Sutherland
- Facilities for Yachts and Recreational Sailing
- Sail Scotland
- Tidy Britain Seaside Awards
- Dolphin Space Programme
- Nairn Tourism Management Plan
- Celebration of the Coast
- UK Coastal Directory
- Tourism Development Plans for the Black Isle & Tain/Seaboard 1990-94
- Harbour (Recreational Use)
- TIC/Visitor Attraction Statistics (See Appendix 1a & 1b)

5. Review of Issues and Opportunities

1. Issue/Opportunity	Local operators'/population's lack of awareness/knowledge of local facilities resulting in a lack of usage.
Rationale/justification	<p>It was apparent to members of the Tourism Topic Group that many local tourism operators such as accommodation providers were not fully aware of the range of tourist facilities available in a local area. If the retention of visitors is to be encouraged then they must be provided with reasons to lengthen their stay. This information must be provided in an easy and straightforward manner and be widely available. It was recognised that many visitors are likely to seek this information from their accommodation providers or other tourist related businesses, however, they are likely to receive limited or even inaccurate information in return.</p> <p>A similar situation also exists among the resident population in having a lack of knowledge or awareness of local facilities which may result in reduced opening hours and ultimately in closure of the facility.</p>
Priority	High.
Future research etc	Monitoring of uptake of training courses to address this issue.
Interaction with other topics	<p>Education & Interpretation.</p> <p>Community Involvement.</p> <p>Economic Development.</p>
Possible Resolutions	<p>a) Training courses related to product knowledge and including site visits.</p> <p>b) Encourage local tourist facilities to be more aware of the need to inform local tourist businesses and in particular accommodation providers about themselves. Also to be aware of the need to involve and communicate with the local resident population. "Open days/nights" a suggested method of undertaking such promotional activity.</p>
How far can MFP tackle this issue	Lead role with regard to training courses will be through the LEC network and supported by the ATBs. MFP can encourage facility operators to consider how best they can communicate with the local population and local tourist businesses, eg through open days/nights.

2. Issue/Opportunity	Business network links/Hotels marketing special package breaks, eg Bird watching, dolphin watching, coastal walks.
Rationale/justification	<p>Only a relatively limited number of hotels appear to be marketing their business along with an "added value" offer. The potential of undertaking "packaged" promotions to sell prospective visitors a product that offers more than simply accommodation plus food seems considerable. The Tourism Topic Group believed there were many specialist niche markets which could be targeted and these include Bird watching, Dolphin watching, Golf, Sailing, Archaeology, Coastal walks etc.</p> <p>It was also felt that tourism businesses are not sharing their experiences as well as they could. It was recognised that business confidentiality and a need for individual businesses to retain their competitive edge were important considerations, however, improved business networking would lead to an overall improvement to business performance.</p>
Priority	Moderate/High.
Future research etc	Monitoring of individual business performance for those that develop niche marketing initiatives.
Interaction with other topics	Education & Interpretation. Natural Heritage. Economic Development.
Possible Resolutions	Improved business development and training Benchmarking to show the performance of individual businesses against the industry "average" would be a valuable tool to encourage greater consideration and participation in programmes.
How far can MFP tackle the issue	To raise these issues with LECs and ATBs.

3. Issue/Opportunity	Business network links/Hotels marketing special package breaks, eg Bird watching, dolphin watching, coastal walks Additional training/business development on product knowledge.
Rationale/justification	<p>There was concern that young people do not consider the tourism industry as a potential career opportunity and the industry's image is still one of seasonal and low paid work. Members felt the image of the industry required enhancing and young people should be provided with a more informed view on the opportunities available in the industry.</p> <p>If the industry is to improve and play an increasingly important role in the economy of the Moray Firth area, it also needs to attract the most able young people into the industry.</p>
Priority	High.
Future research etc	Continuous monitoring of uptake of training courses.
Interaction with other topics	Education & Interpretation.
Possible Resolutions	Encourage programmes aimed at informing young people of the opportunities in the tourism sector.
How far can MFP tackle the issue	Raise issue with Education authorities and LECs.

4. Issue/Opportunity	Lack of Interpretive boards/signposting.
Rationale/justification	<p>It was recognised with cut-backs in Local Authority funding and as a consequence a reduction in the funding of ATBs that staffed Tourist Information Centres have been closed and it is highly unlikely that any additional TICs will be open in the short/medium term. It was also recognised that many communities without a staffed TIC require to be promoted and that Interpretive Boards area method of providing such promotion.</p> <p>It was also recognised that a visitor's enjoyment of an area or feature can be considerably enhanced through an improved understanding about the facility through high quality Interpretive Boards and good signposting.</p>
Priority	High.
Future research etc	Continuous monitoring of requirements for Interpretive Boards.
Interaction with other topics	<p>Education & Interpretation.</p> <p>Community Involvement.</p> <p>Economic Development.</p> <p>Sport and Recreation.</p> <p>Natural Heritage.</p>
Possible Resolutions	Support of the Highland Interpretive Strategy. Encourage Councils, LECs, SNH, Forest Enterprise, ATBs and local Communities to work together in partnerships to develop improved Interpretation and Signposting.
How far can MFP tackle this issue	Through highlighting the issues and identifying specific requirements.

5. Issue/Opportunity	Poor infrastructure/accessibility/public transport (especially airport links).
Rationale/justification	<p>An integrated transport strategy and the provision of up to date, easily accessible and easy to understand information on public transport will benefit local communities and the significant number of residents that do not have access to private transport.</p> <p>There was particular concern with public transport links to Dalcross Airport.</p>
Priority	Medium
Future research etc	Ongoing research, surveys and monitoring required.
Interaction with other topics	Economic Development.
Possible Resolutions	This is a major issue which requires the continuing involvement of Councils, Transport Operators, LECs and the Scottish Office.
How far can MFP tackle this issue	To highlight and identify particular problems.

6. Issue/Opportunity	Weather.
Rationale/justification	<p>While the Moray Firth coastal area has lower levels of rainfall than most other parts of Scotland there are still many days in which the weather is inclement. In addition there is still a perception that all of Scotland is wet.</p> <p>There is therefore a need to provide facilities for wet weather and to promote these facilities in order that prospective visitors will be aware of there being a wide range of facilities and attractions in the event of there being poor weather.</p>
Priority	Good provision of wet weather facilities already exist, although additional facilities may be required in specific locations. Priority for additional facilities is low.
Future Research etc	None identified.
Interaction with other topics	Economic Development.
Possible Resolutions	Liaison with LECs and Councils about future provision of wet weather facilities.
How far can MFP tackle this issue	Liaison with LECs and Councils.

7. Issue/Opportunity	Visitor needs/expectations not always met.
Rationale/justification	Members of the Group felt that insufficient information is available on whether the needs and expectations of visitors are met when they visit the Moray Firth area. It is only when such information is available can programmes/actions be undertaken to address the issues raised. There were concerns that elements of the product do not meet customer needs and expectations but the elements require to be quantified.
Priority	High.
Future research etc	Visitor needs and expectations research required. This to be considered by the ATBs and LECs.
Interaction with other topics	Economic Development.
Possible Resolutions	After the research is completed the results should be disseminated to the tourism sector and in particular the accommodation sector as well as the LECs, ATBs, Councils.
How far can MFP tackle this issue	To raise the issue with ATBs and LECs.

8. Issue/Opportunity	Look at Tourism Information Centre (TIC) opening hours/accessibility. Aberdeen is the only TIC open year round. Buckie, Cullen, Lossiemouth are permanently closed leaving only seasonal offices at Banff and Fraserburgh.
Rationale/justification	Particular concerns raised about the level of TIC provision in the Grampian area following the closure of three of the five TICs and the downgrading of Banff TIC from an all year opening to a seasonal office. It was felt this significant diminution of service would result in visitors being unable to obtain detailed information on particular local areas.
Priority	Moderate.
Future research etc	To be the responsibility of the ATB to monitor the needs of visitors.
Interaction with other topics	Economic Development.
Possible Resolutions	Consider offering tourist information services at existing attractions/shops. However must be aware of potential concerns of outlets promoting only their own local area/business and self interest to the exclusion of other areas/businesses.
How far can MFP tackle this issue	To raise the concerns with the ATB.

9. Issue/Opportunity	Litter problem; lack of public toilet provision.
Rationale/justification	<p>Council budget cuts have already led to the closure of a number of public toilets and increasing pressure on budgets may lead to further cuts. Concerns also that litter collection has also been reduced. The provision of public toilets is a very basic but important element of the tourism infrastructure. While it can be difficult to quantify the economic impact of such closures, it is believed that visitors' enjoyment will be impaired through a shortage of such facilities. It may also result in increased damage to the environment.</p> <p>A reduction of litter collection is likely to lead to overflowing litter bins as witnessed at a variety of popular coastal locations and a reduction in the visual appearance of a location. Damage to the environment is a further consequence of such actions.</p>
Priority	High.
Future research etc	Monitoring of situation.
Interaction with other topics	Environmental Quality.
Possible Resolutions	Political awareness - Partnership needs support of politicians in the areas involved.
How far can MFP tackle this issue	To participate in the lobbying process to ensure that the impact of such cost cutting measures are fully recognised and understood.

10. Issue/Opportunity	Events led marketing. Draft events strategy. Extend season with festivals. Take advantage of national/regional promotions/initiatives and community initiatives which are more likely to achieve lottery support. Nairn TMP could be used as a model.
Rationale/justification	<p>In a competitive tourism environment it was recognised that visitors must be provided with reasons to visit an area. It was also recognised that areas must look to get "competitive advantage" over other areas. It was further recognised that the issue of seasonability in the tourism sector needs to be addressed.</p> <p>It was felt that the above issue could be partially addressed through an "Events Led" marketing strategy which capitalises on the many events already taking place across the area.</p>
Priority	Moderate.
Future research etc	Report required on the most effective way to progress and implement this proposal.
Interaction with other topics	Community involvement.
Possible Resolutions	Initial report required. Suggest that LECs are approached to fund the Report.
How far can MFP tackle this issue	To raise the issue with LECs.

11. Issue/Opportunity	Improved produce development to include: Coastal Walks, Sailing Development, Wildlife (esp develop off-season), Caithness Harbour Trail linked with Grampian. [More extensive press familiarisation trips].
Rationale/justification	There are a number of opportunities to further develop the tourism product. It is recognised that market forces play the main role in determining the supply of such facilities. It was still believed that opportunities did exist and the public sector in partnership with the private sector could play a key role in identifying and developing produce and business development opportunities.
Priority	High.
Future research etc	Responsibility of Councils and LECs.
Interaction with other topics	Sport & Recreation. Economic Development.
Possible Resolutions	The lead in developing such initiatives lies with the LECs although the Councils will also have a key role to play.
How far can MFP tackle this issue	To raise the issue with the LECs and Council.

12. Issue Opportunity	To designate a tourist route/trail along the Moray Firth Coast and produce supporting promotional literature.
Rationale/justification	There were differing views from members of the Topic Group on the value of such a promotion. Some members thought considerable benefits could be obtained through a signposted Tourist Trail/Route along the entire Moray Firth Coast supported by a promotional item of print and interpretative boards. Other members felt the Moray Firth Coastal Area as a single entity did not attract a natural flow of visitor traffic but as two fairly distinct tourist areas and efforts made to try and radically alter the "natural" movements of the Visitor flows would not be a cost effective use of resources.
Priority	Requires discussion with ATBs on how they review the merits of such an initiative.
Future research etc	Research required on the pattern of visitor flows along the Moray Firth.
Interaction with other topics	Education and Interpretation. Economic Development.
Possible Resolutions	Requires the support of the ATBs as they will be the bodies responsible for progressing and implementing the proposal.
How far can MFP tackle this issue	To raise the issue with the ATBs.

APPENDIX 1 (a)

VISITOR NUMBERS TO TICs AND VISITOR ATTRACTIONS WITHIN THE FRASERBURGH TO JOHN O' GROATS COASTAL REGION		
TOURIST INFORMATION CENTRES	VISITOR NUMBERS	
<u>Aberdeen & Grampian Tourist Boards</u>	<u>1995</u>	<u>1996</u>
Fraserburgh	9,754	8,516
Banff	15,254	13,523
Elgin	46,298	30,280
Forres	23,508	21,750
Totals	94,814	74,609
<u>Highlands of Scotland Tourist Board</u>		
Nairn	23,878	24,269
Inverness	259,510	304,511
North Kessock	36,197	54,617
Dornoch	32,310	37,124
Helmsdale	10,117	13,586
Wick	25,897	30,847
John O'Groats	20,723	24,640
Totals	408,632	489,594
Combined Totals	503,446	564,203

Prepared by R MacDonald 30/9/07 PRD: coastal attractions

APPENDIX 1 (b)

VISITOR ATTRACTIONS	1995	1996
Lighthouse Museum, Fraserburgh	14,772	25,492
Colleonard Sculptures, Banff	7,590	6,000
Duff House, Banff	35,254	24,680
Banff Museum	5,300	1,695
Baxters Visitor Centre, Fochabers	205,000	224,692
Fochabers Folk Museum	9,788	10,959
Cashmere Visitors Centre, Elgin	128,767	143,000
Elgin Cathedral	16,742	15,745
Elgin Museum	7,600	9,063
Spynie Palace, Elgin	11,234	10,344
Lossiemouth Fisheries Museum	2,365	2,837
Findhorn Village Heritage Centre	574	651
Dallas Dhu Distillery, Forres	13,706	17,517
Dufftown Museum, Forres	19,862	18,015
Falconer Museum, Forres	6,707	7,481
Nelson's Tower, Forres	2,459	2,498
Tugnet Ice House, nr Forres	9,690	7,070
Brodie Castle, nr Forres	34,532	36,185
Invernairn Mill, nr Nairn	50,000	36,000
Nairn Fishertown Museum	1,147	2,392
Cawdor Castle, Nairn	97,329	111,324
Fort George & Museum, Ardersier	49,029	56,003
Culloden Visitor Centre	125,128	152,735
Dolphins of the Moray Firth, Kessock	6,440	10,000
Black Isle Country Park, N Kessock	18,000	29,000
Groam House Museum, Rosemarkie	6,408	6,201
Hugh Millars Cottage, Cromarty	7,057	7,486
Cromarty Courthouse	15,470	13,411
Dingwall Museum	5,030	2,999
Tain Through Time	7,035	7,229
Glenmorangie Distillery, Tain	6,500	10,000
The Old Post Office Centre, Dornoch	32,005	35,068
Orcadian Stone Co, Dornoch	10,452	10,465
Dunrobin Castle & Gardens	57,885	69,980
Clynelish Distillery, Brora	8,500	9,000
Timespan, Helmsdale	13,891	13,209
Laiday Croft Museum, Dunbeath	9,542	9,705
Lyth Arts Centre, nr Wick	3,073	1,011
Northlands Viking Centre, Auckengill	2,156	2,005
The Last House Museum, John O' Groats	30,000	30,000
Totals	1,093,969	1,189,147
Notes:		
1) Includes all visitor attractions with recorded numbers within 4 miles from the coastline.		
2) Excludes all visitor attractions within the town of Inverness		
3) Rounded figures (ie: 10,000) indicate estimated figures.		

APPENDIX 2

Tourism Topic Group Members:

Scott Armstrong - Highlands of Scotland Tourist Board (Chair)

Margaret Crawford - Highlands of Scotland Tourist Board (Topic Group Administrator)

Sheila Adam - Highlands & Islands Enterprise

Pierre Masson - Moray Council

Gordon Ireland - Highland Council

Gavin McKesock-Leitch - Representing Aberdeen and Grampian Tourist Board

Neil Black - Scottish Tourist Board

Richard Myers - Inverness and Nairn Enterprise

Keith Newton - Aberdeenshire Council

Duncan Bryden - Highlands & Islands Enterprise

Katrina Morrison - Grampian Enterprise

Neil Sutherland - Moray Badenoch & Strathspey Enterprise

Bill Taylor - Scottish Natural Heritage