
Report To:	Regeneration Committee	Date:	7 May 2009
Report By:	Corporate Director- Regeneration and Resources	Report No:	RC/09/05/07/SJ/LL
Contact Officer:	Stuart Jamieson	Contact No:	01475 715555
Subject:	Inverclyde's Tourism Strategy 2009 - 2016		

1.0 PURPOSE

- 1.1 The purpose of this report is to seek Committee's approval of *Inverclyde's Tourism Strategy 2009 - 2016*

2.0 SUMMARY

- 2.1 The Economic Development Service has produced a tourism strategy (Appendix 1) for 2009/16, in consultation with tourism related businesses and services. In developing this plan, account has been taken of related strategies and plans developed by the Council and key partners, as well as national strategies, for example, the Scottish Government's Tourism Framework for change; the Corporate Plan, Community Plan, the Directorate Plan and the forthcoming Economic Strategy for Inverclyde.
- 2.2 The development of tourism in Inverclyde is seen as a major opportunity to change perceptions of the area and create a more positive profile and image. Inverclyde's Tourism Strategy aims to provide a strategic focus for the community of Inverclyde together with other stakeholders.
- 2.3 This sector is diverse, including leisure, arts, accommodation, and hospitality also including a high quality public realm. The amenities which support the tourism sector area also valued by the resident population and will assist with addressing the population decline.
- 2.4 The strategy outlines the key objectives required to maximise the tourism potential of Inverclyde, from which a working group will develop the tourism action plan.

3.0 RECOMMENDATION

- 3.1 That Committee:

Approves the *Inverclyde's Tourism Strategy 2009 – 2016* attached as Appendix 1 and remits the Head of Economic and Social Regeneration to develop an action plan which will be presented to Members shortly after the summer recess

4.0 IMPLICATIONS

4.1 Finance:

Financial Implications – One off Costs

Cost Centre	Budget Heading	Budget Year	Proposed Spend this Report	Virement From	Other Comments
n/a	n/a	n/a	n/a	n/a	Allocation for tourism expenditure included within existing Economic Development budget 2009/10 and 2010/11

Financial Implications – Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact	Virement From (If Applicable)	Other Comments
n/a	n/a	n/a	n/a	n/a	n/a

Personnel: None. Activity will be delivered by existing staff.

Legal: N/A

Equalities: Full consideration is given to equality and diversity processes within employability and business support programmes delivered by Economic & Social Regeneration which are non-discriminatory on the grounds of gender, ethnicity, religion or belief, disability, age or sexual orientation.

Programme design is undertaken with consideration of the diverse needs of target clients and to fully enable their participation.

The employability agenda is an integral component of promoting social inclusion and geographical targeting at our most disadvantaged areas and individuals.

Inverclyde's Tourism Strategy 2009-2016

Working together for Future Growth

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INTRODUCTION

The River Clyde has always been the main economic asset and life blood of the Inverclyde area providing employment opportunities initially through the import/export trade at its ports and subsequently through the shipbuilding and heavy engineering industries. Access to the river has been limited for most of the last century due to the riverside location of the buildings associated with these activities but now a once in a lifetime opportunity to regenerate the riverside from Port Glasgow to Gourock through an Urban Regeneration Company (Riverside Inverclyde), has given the Inverclyde area a chance to reinvent itself again and focus on the Tourism sector as a way forward.

The development of tourism in Inverclyde is seen as a major opportunity to change perceptions of the area and create a more positive profile and image and greater economic prosperity for the area and its people. Inverclyde's Tourism Strategy aims to provide a strategic focus for the community of Inverclyde together with other stakeholders such as Scottish Enterprise, Visit Scotland and the businesses that currently (or will potentially) provide services to tourist visitors when they come to the area. The adoption of the tourism strategy by all stakeholders will also provide a focus and an opportunity to overcome some of the negative perceptions of our area which has traditionally been known for heavy engineering and shipbuilding (and more recently its social problems) through positive promotion of the good things about our area and its tourism opportunities.

Year on year an increasing number of cruise liners are coming to Inverclyde resulting in thousands of passengers coming through the Ocean Terminal at Greenock every year (39,481 in 2005 which was the highest number of passengers for any Scottish port¹). In recognition of the importance of cruise liners to the local economy, Inverclyde Council and Riverside Inverclyde are already working with Clydeport to improve the visitor experience at the Ocean Terminal by investing £100k in improvements at the terminal for the 2009/10 season. Currently the majority of the visitors coming to Greenock choose to take trips to Glasgow/Edinburgh/Stirling/The Highlands rather than stay in the area as we have a limited number of fully developed quality tourism products and services to provide them with alternatives to explore our area. This is particularly true of a lack of developed water based activities on the Clyde which can offer some of the best sailing in Europe with numerous islands and small towns and sheltered anchorages within a short distance.

Inverclyde's tourism products are very diverse ranging from water based activities on the riverside and land based leisure opportunities in the hinterland, to unique cultural and heritage experiences all over the area making this its unique selling point within the Scottish tourism product landscape.

Inverclyde's Tourism Strategy aims to bring together local people, the business community and public sector partners, to promote the positive aspects of the area and allow them to contribute and participate in the development of tourism in this area and provide a sound economic future for the area through the implementation of a subsequent action plan.

¹ Scottish Cruise Tourism Strategy – TTC International and Roger Tym & Partners (commissioned by Visit Scotland and Scottish Enterprise)

BACKGROUND

Inverclyde is an area of unrivalled beauty, situated along the broad coastal reaches of the River Clyde with breathtaking views to the Argyll Hills and Scottish Highlands. Shipbuilding, manufacturing and trading industries brought prosperity to Inverclyde in the 19th and 20th centuries, spawning such illustrious sons as James Watt. Today many of Inverclyde's tourism products, including its historical attractions, celebrate the influential maritime history of the area and its industrial past and in addition there are leisure opportunities for all visitors to the area with our sports, leisure and entertainment facilities being among the best in Scotland. Inverclyde's hinterland also has spectacular moorlands, hills and lochs which lie mainly within Clyde Muirshiel Regional Park, and provide a haven for the rarest species of Scottish wildlife whilst offering a variety of outdoor pursuits and activities.

In 2006 the Scottish Government published a document entitled "A Scottish Tourism Framework for Change – the next decade"² with some challenging targets for the tourism industry. The document draws from both "Smart Successful Scotland" and the "Framework for Economic Development" (Scottish Government publications) and more recently in January 2009, "Tourism Framework for Change".³ In order to ensure a strong basis for the actions identified in the Tourism Framework, it sets out what the industry needs to do in order to provide a stepped change in the delivery of Scottish tourism and the way in which various public agencies will need to operate to support the industry to do this.

Regionally and locally, the framework is set in the context of the following plans and strategies:-

- Community Plan (Inspiring Inverclyde)
- Single Outcome Agreement (Tackling Poverty, Sustaining Growth)
- Inverclyde Council's Corporate Plan
- Glasgow and Clyde Valley Structure Plan
- Local Inverclyde Development Plan
- Inverclyde Arts Strategy
- Inverclyde Events Strategy
- Inverclyde Interpretation Strategy

The Area Tourism Partnerships (ATP's) which are being established across Scotland are tasked with driving and supporting change at a local level by interpreting the national framework to reflect local opportunities and aspirations through the development of Area Tourism Partnership Plans. The role of the ATP's is to promote close partnership working with local businesses, culture and heritage organisations, local authorities and other public sector support agencies such as Visit Scotland to deliver a range of activities and actions raising awareness and participation in local tourism activities to make a contribution to the growth ambitions of Scottish tourism.

In a recent national report commissioned by Visit Britain and the Tourism Alliance entitled "The Economic Case for the Visitor Economy", the value of the tourism sector to the UK economy was acknowledged as being of growing importance to the socio economic agenda as well as to the development of existing businesses either directly or indirectly involved in the supply chain.

² Scottish Tourism The Next Decade – The Scottish Government 2006

³ Tourism for Change – Scottish Tourism: Making a Step Change 2009

For example the research has indicated that:-

1. Tourism related employment can provide labour market entry opportunities to those with low skills, who can only work part time and those who may not currently engage in the labour market
2. Recent years have seen strong entrepreneurial activity in the tourism sector with one of the highest levels of business creation across all sectors
3. There is evidence of the disproportionate contribution of the visitor economy to rural and coastal locales
4. Tourism often acts as the catalyst for wider regeneration and development in a number of urban areas previously blighted by industrial decline

The delivery of the Tourism Strategy will also help to deliver a number of local outcomes set out in the Single Outcome Agreement particularly:-

- Inverclyde's population is stable with a good balance of socio-economic groups
- Communities are stronger, responsible and more able to identify, articulate and take action on their needs and aspirations to bring about an improvement in the quality of community life
- The area's economic regeneration is secured
- Economic activity in Inverclyde is increased and skills development enables both those in work and those furthest from the labour market to realise their full potential
- Inverclyde is a place where people want to live now whilst at the same time safeguarding the environment for future generations

THE CURRENT POSITION

Inverclyde offers a wide and varied range of activities, attractions and leisure opportunities set against a background of spectacular natural heritage both water and land based. Much of the tourism business in the area (cruise line passenger for example) is seasonal but the area does offer year round activities and events which has scope to develop further. Inverclyde's tourism product portfolio is already very diverse, potentially offering something for everyone but there is potential for additional capacity and opportunities to promote what's on offer more widely.

The current position is summarised in the analysis of Strengths, Weaknesses, Threats and Opportunities below-

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Proximity to Glasgow city centre • Proximity to Glasgow and Prestwick airports • Location on the Clyde • Excellent transport links • Good public transport network • Regeneration projects along the waterfront • Existing basic range of tourism products and services • Ferry links to Argyll & Bute • Clyde Muirshiel Regional Park located in the area • Strong sense of community • Strong history of community events • Rural/town/outdoor product • Tall Ships event returning in 2011 	<ul style="list-style-type: none"> • Lack of belief in the Inverclyde tourism product • Lack of ambition • Limited effective partnership working • Lack of a tourism strategy • Lack of a tourism plan for the area • Limited local tourism research and data • Lack of a USP for the area • Lack of a major "must see" visitor attraction • Vulnerability due to one main arterial road in and out of area • Lack of spaces for large land based spectator or participant events • The weather restricts the development of outdoor events, activities and services
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Ferry links to Argyll and Bute • Increasing numbers of cruise liners visiting Greenock • Creation of new marina at the Harbours • New residents coming into waterfront housing • Green tourism and sustainability partnerships • Potential for the development of more land and water based activities • The events strategy • Development and opening up access to more of Clyde Muirshiel Regional Park • Development of a tourism partnership • Improve the visitor experience • Increase the variety of tourism products • Improve the quality standards • Future development of sports facilities • Joint marketing with Visit Scotland • Promoting the Inverclyde brand • Accommodation capacity • The current credit crisis resulting in more UK residents staying at home • Potential expansion of safe cycle and walking routes along the waterfront • Waterfront regeneration projects expanded • Collaboration with non core tourism businesses eg retail, restaurants and taxis • Possibility Clyde Muirshiel becoming a National Park • Ideas for new aspirational tourism attraction products 	<ul style="list-style-type: none"> • Increased competition from other areas • Lack of range of accommodation options • Quality of product • Quality of service • Lack of investment • Ferry links to Argyll & the Highlands • Inactivity – doing nothing • Unwillingness to work in partnership • Indifference and reluctance to embrace change • Climate change and flooding issues not addressed • Waterfront regeneration not completed

STRATEGIC CONTEXT

In Scotland, tourism generates £4.2bn for the economy and supports 200,000 jobs in 20,000 diverse businesses per annum. Although growing the size of the overseas visitor market is very important, this sector represents only 19% of Scottish tourism activity with 44% of tourism trips in Scotland taken by Scots themselves and 47% are made by visitors from England and Wales².

In 2006, the Scottish Government set a national target of 50% revenue growth in tourism by 2015 which for Inverclyde would mean a target of an additional £3m annually and potentially the creation of an additional 600 new tourism related jobs over the period.

The volume and value of tourism in the area has been calculated for the past 10 years using the Scottish Tourism Economic Activity Monitor (STEAM) by Global Tourism Solutions (UK) Ltd. This provides consistent data across individual Local Authority areas, by visitor numbers, tourist days, tourism revenue and employment levels within the sector. It also provides a breakdown by category of visitors staying in serviced, non serviced accommodation, visiting friends and relatives or visitors on a day trip to the area.

The tables below provide an overview of the current picture of tourism in Inverclyde comparing 2006 with 2007. Overall there has been a -2% reduction in total tourism revenues between 2006 and 2007 in the area although the urban revenue showed a small 1% increase. All sectors of expenditure however show a -2% reduction over the same period. Numbers of visiting tourists to the area also shows an overall reduction of -2% between 2006 and 2007 although the reduction of day visitors was not as high as for those staying in the area.

Overall, some 567,000 visitors came to Inverclyde in 2007 spending in the region of almost £53m. The tourism industry in the area currently supports around 1150 FTE jobs and has shown a slight increase in the numbers employed in accommodation provision.

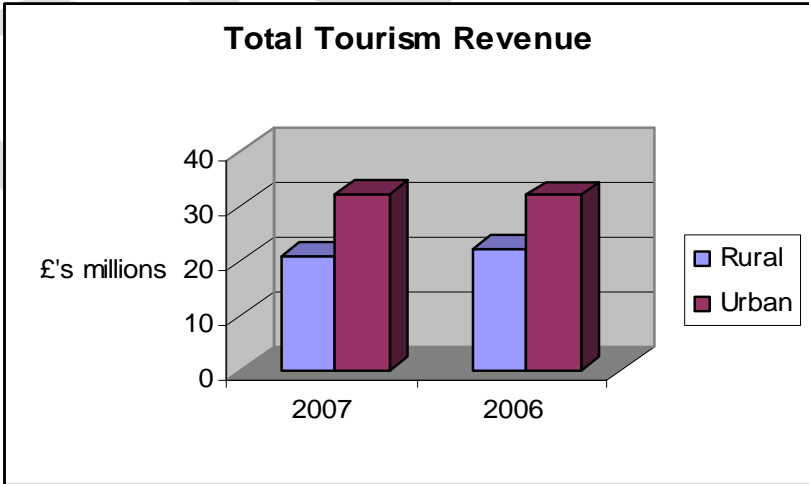


Fig 1 - Inverclyde STEAM Report 2007 – Global Tourism Solutions

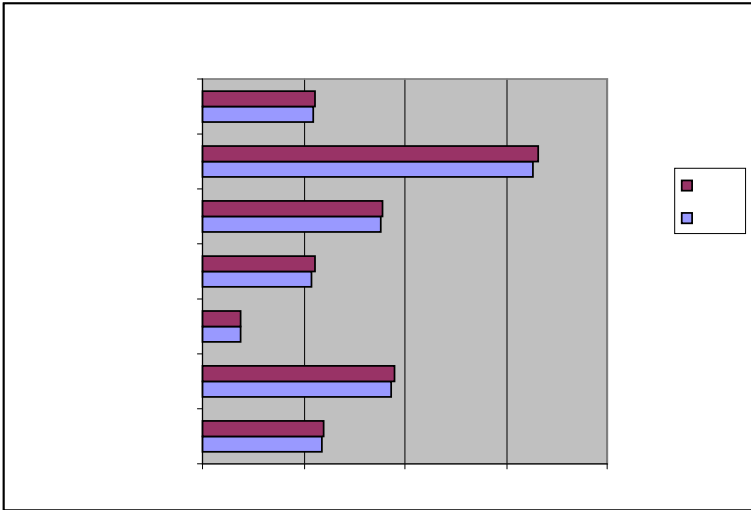


Fig 2 - Inverclyde STEAM Report 2007 – Global Tourism Solutions

These trends are disappointing but demonstrate the need to focus future effort on supporting and developing the tourism sector to capitalize on the aspirations of the Scottish Government target to grow the industry by 50% by 2016.

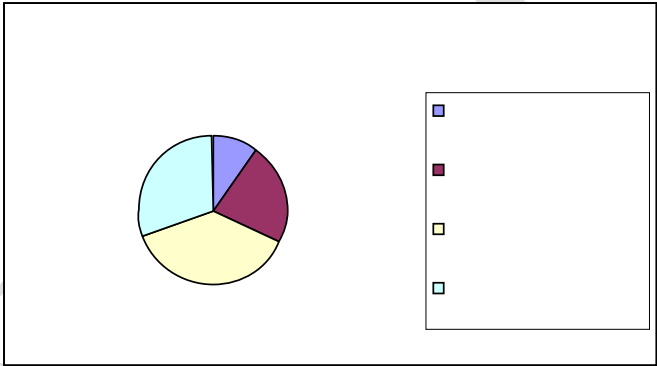


Fig 3 - Inverclyde STEAM Report 2007 – Global Tourism Solutions

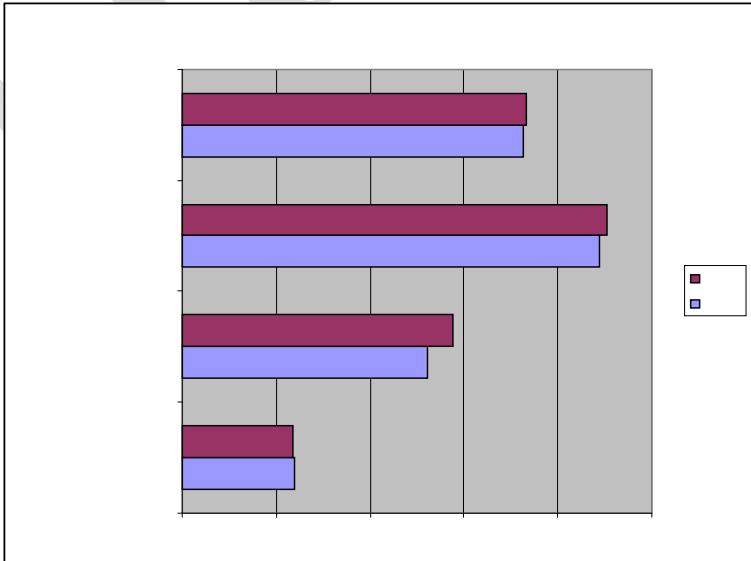


Fig 4 - Inverclyde STEAM Report 2007 – Global Tourism Solutions

CHANGING CONSUMER TRENDS

Visit Scotland's consumer research shows that the most important factors in choosing Scotland as a leisure destination are currently:-

- Scenery
- Natural environment
- Number of things to see and do
- The friendly attitude of the local people

Visit Scotland has identified 3 main product segments for leisure visitors to Scotland that are to be the primary focus for their marketing activities and campaigns over the next few years:-

1. Freedom of Scotland (wildlife and touring)
2. Active (golf and adventure)
3. Cities and culture (city breaks and culture)

Although visitors to Scotland like what we offer them currently, there is increasing evidence that the markets are changing and today's visitors are unlikely to be looking for one or two week holidays in the one place. Indeed there is evidence that the vast majority of visitors by 2015 will live within a 3 hour travelling distance of their final destination in Scotland.

Future demands for visitors to Scotland are likely to include:-

- Customised and flexible travel to a destination generally within 3 hours travel time
- Special interest holidays and special experiences
- An authentic experience
- Good value for money
- An interest in good health leading to demands for activity breaks
- The use of a break as a personal reward or well being experience
- Increasing interest in extended education and for history/culture related activities

Potential tourism business entrepreneurs in Inverclyde need to recognise and seize this valuable information and seek to identify business propositions and opportunities: working together to develop new products and services to meet future requirements of current and future visitors to our area.

THE CHALLENGE AND THE VISION

The target of attaining a 50% growth rate by 2016 for tourism development (which was set by the Scottish Government in 2006), in the current economic climate is proving to be extremely challenging. In order to reach these targets, those who are involved in delivering tourism products and services across Scotland, must work together sharing common aims and objectives, both as individuals and as members of partnerships at a local area level as well as nationally, to maximise the benefits from tourism to the Scottish economy. To achieve this target, the main focus will be on marketing Scotland as a short break destination by 2015 building to “A Dynamic Scotland” by 2025.

In order to make progress towards the government target, everyone involved in tourism businesses (both private and public sector) in Inverclyde, must agree that the way forward is to work together in partnership through the adoption and implementation of The Inverclyde Tourism strategy and Tourism Action Plan to realise shared objectives. This will also involve working together to maximise any financial resources available through joint bids for funding or through matching existing private and public funds. Utilising knowledge of the local area will allow Inverclyde tourist providers to move into new markets and develop new products and services in line with the areas of growth identified by Visit Scotland and where there is proven market customer demand.

Everyone who lives or works in Inverclyde and interacts with visitors, should be encouraged to act as ambassadors for the area in order to promote the message that tourism is everyone's business and endeavour to provide the best visitor experiences possible and make Inverclyde a must see and must return to destination.

THE STRATEGY - key objectives

Inverclyde's Tourism Strategy 2009-2016 aims to maximise the potential that exists to develop the tourism product in the area and sets out the priorities for all strategic partners to work towards over the next 7 years.

Key Objective 1

To develop quality market information

Key Actions

- Develop a comprehensive monitoring and feedback mechanism for Inverclyde
- Establish a comprehensive database of all Inverclyde tourism products and operators
- Investigate and research new and evolving niche markets

Key Objective 2

To exceed visitor expectations

Key Actions

- Invest in the development of skills and training for staff to ensure that customer expectations are exceeded
- Develop a consistently high standard of customer service excellence
- Encourage participation in Visit Scotland quality schemes by all tourism businesses
- Encourage the development of local inspirational managers and leaders in tourism businesses
- Develop close partnerships between tourism industry and education
- Improve access and transport links
- Improve public realm areas
- Improve built environments (remediation of derelict land and decaying infrastructure)
- Develop consistent and comprehensive visitor signage in the area
- Develop an improved visitor reception area at the Ocean Terminal
- Capitalise on the assets of the natural environment
- Encourage participation in the green business scheme
- Ensure that all tourism development projects adhere to sustainable principles
- Develop and promote a clean and green Inverclyde
- Encourage a sense of "Pride in Inverclyde" for local people to become ambassadors and informal promoters of the area
- Co-ordinate and distribute up to date tourist information to all tourism outlets
- Work to Develop and work in partnership with the Inverclyde TRAL (Tourism/Retail/Arts/Leisure) group
- Support and develop The Inverclyde Tourist Group who potentially will form the support/outreach for the Inverclyde ambassadors
- Develop and deliver a programme of local Inverclyde "Welcome Host" type awareness courses for all involved in tourism

Key Objective 3

To develop effective partnerships for tourism in Inverclyde

Key Actions

- Identify potential members and establish the local area tourism partnership for Inverclyde
- Gather and disseminate to all businesses and communities, a comprehensive set of information about tourism products and operators in the area
- Identify, develop and work with the third sector and local communities to create more information providers and tourism ambassadors
- Ensure that tourism is recognised by all Alliance partners and included in all relevant strategies and plans including the Arts Strategy
- Work with schools to encourage the development of tomorrow's ambassadors

Key Objective 4

To improve the quality and range of the tourism product through innovation and product development

Key Actions

- Recognise and build on existing assets
- Assist with the development of new products and services by encouraging innovative ideas
- Gather, disseminate and share customer feedback
- Assist and encourage tourism businesses to start up, grow and develop
- Develop leadership skills amongst tourism businesses
- Develop and promote a range of quality events and festivals
- Develop collaborative projects with our neighbours
- Encourage participation by all tourism providers in the Visit Scotland Quality assurance schemes
- Improve and develop existing visitor attractions
- Promote tourism as a long term career choice through college, schools and Jobcentres
- Develop town centres and retail facilities
- Develop safe cycle and walking routes in the area
- Develop a range of new water and land based activities
- Develop sports and recreation facilities
- Develop a minimum E-business capability for all tourism operators
- Develop a plan to maximise sources of funding to support tourism development

Key Objective 5

To market and promote the Inverclyde tourism product

Key Actions

- Develop and implement a brand strategy to position and differentiate Inverclyde from surrounding areas
- Create targeted marketing campaigns to focus on niche market opportunities such as sailing, cruise liners
- Identify and actively promote the unique selling points for Inverclyde to appropriate segments of the market
- Proactively market both water and land based leisure activities
- Proactively market all Inverclyde events and festivals
- Identify a key officer within Council to act as a single point of contact for tourism, leading and implementing the strategy and promoting the tourism Inverclyde product

- Identify a well known media personality (who has connections with Inverclyde) to act as a product champion for the area and promote a positive image of what's available here to change negative perceptions

Key Objective 6

To develop innovative, aspirational projects for the future

Key Actions

- Organise a brainstorming session across the tourism sector in Inverclyde to identify potential projects for the next 7 years
- Identify potential funding sources and make appropriate applications

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DELIVERY OF THE STRATEGY

This strategy has been prepared in partnership with key stakeholders and in full consultation with the local business community and national bodies with an interest in tourism development as indicated below:-

- Discover Inverclyde
- Greenock Chamber of Commerce
- Inverclyde Council
- Scottish Enterprise
- Visit Scotland
- Sail Scotland
- Clydeport
- Sports Scotland
- Scottish Natural Heritage
- Historic Scotland
- Riverside Inverclyde
- The Inverclyde Alliance
- The Inverclyde Tourist Group
- Caledonian Macbrayne
- Western Ferries

The next stage in the process will be the creation of the Local Area Tourism Partnership (LATP) group whose first task will be to develop an Action Plan from the strategy and clearly lay out a framework to link actions with organisations and people who will lead on and take forward, specific activities to deliver outputs. The delivery of the objectives within the strategy will also be monitored and evaluated by the LATP throughout the lifetime of the strategy ie until 2016 and adjustments made to the Action Plan as required in order to ensure that the objectives are being met.

The aim of the Action Plan will be to translate the objectives of the strategy into specific, measurable, practical, realistic activities and actions, thereby ensuring that the overall objectives of the strategy will be met through delivery by Inverclyde tourism businesses, the public sector and communities working together.

The role of Inverclyde Council in the creation and implementation of the action plan to deliver the strategy will be to act as a facilitator in order to engage the private sector to help them establish and provide the lead on the Local Area Tourism Partnership and then build closer links with key public sector and third sector partners.

Inverclyde Council will also aim to work more closely with Scottish Government and Visit Scotland authorities to access and share information resources in terms of industry knowledge, marketing initiatives, business development tools and quality assurance schemes and will provide the following:-

- Assistance to investigate possible European/Scottish Government funding support to the partnership eg structural funds to support business development and training
- Planned linked investment through regeneration of the waterfront and investment in local sports facilities and council run tourism attractions
- Representation for the interests of the area at Visit Scotland meetings including specific segment focused groups such as Cruise Scotland, Sail Scotland and ASVA (Association of Scottish Visitor Attractions)

Inverclyde Council will also aim to explore new collaborations with other neighbouring local authorities such as Argyll and Bute, North Ayrshire and Renfrewshire to seek new mutually beneficial ways of working together in future to generate increased numbers of day and short stay visitors to the area. This could be in areas such as the development of sustainable transport options or facilitating introductions between commercial tourism service providers to encourage them to provide comprehensive solutions to visitors.

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