Inverclyde council

AGENDA ITEM NO: 12

Report To: Environment & Regeneration Committee	**Date: 28th April 2016**
Report By: Corporate Director – Environment, Regeneration & Resources	**Report No: E+R/16/04/03/SJ/RG**
Contact Officer: Stuart Jamieson	**Contact No: 01475 712402**

Subject: Review of the Inverclyde Tourism Strategy 2009-2016 and approval of a refreshed Inverclyde Tourism Strategy for 2016-2020

1.0 PURPOSE

1.1 The purpose of this report is to apprise Members of the Review of Inverclyde Tourism Strategy 2009-2016 and seek approval of the refreshed Inverclyde Tourism Strategy for 2016-2020.

2.0 SUMMARY

2.1 The Inverclyde Tourism Strategy 2009-2016 was produced in consultation with tourism related businesses and services, reached the end of its lifespan at the end of March 2016 and following a consultative evaluation of the current strategy, carried out by Coigach Consulting, a review of the outcomes and achievements is now being submitted for consideration to Members.

2.2 At the same time as the Strategy review, it was agreed that a refresh of the strategy should also be undertaken for the 2016-2020 period to align with the National Strategy: Tourism Scotland 2020.

2.3 The review report on the Inverclyde Tourism Strategy 2009-2016 is attached as Appendix 1 and provides an overview of what has been achieved over the life span of the strategy.

It is worth highlighting the following:

- Although the number of tourism businesses in Inverclyde has remained relatively stable at around 100, there have been several retirements/closures and new start-ups over the last 7 years. The economic impact from tourism activities has increased from £42.23M in 2009 to £60.08M in 2015 with FTE's rising from 918 to 984 by the end of 2015.
- Inverclyde's performance over the last 2 years (STEAM 2015) compares favourably with our near neighbours with our overall economic impact showing an average 5% growth compared to less than 3% in neighbouring authorities. In terms of FTE percentage growth, Inverclyde has increased by 2.5% whereas our near neighbours have grown by around 1%.
- The successful attraction of the second Tall Ships Race in 2011 and the Powerboat P1 event in June 2016 (through a partnership of Riverside Inverclyde, Inverclyde Council, Discover Inverclyde and Greenock Chamber of Commerce) and the commitment to bid for further large events in Inverclyde in the future.
- The increased number of Visit Scotland accredited Visitor Attractions, Arts Venues, accommodation providers and Taste Our Best recognised restaurants/cafes in Inverclyde.

2.4 As part of the consultation process for the Strategy refresh, a further piece of work was commissioned for Lynn Jones Research to provide an Inverclyde Tourism Business Barometer for 2015 in consultation with a selection of tourism businesses across the area.

Highlights of the report include:

- Improving conditions for Inverclyde tourism businesses with levels of business increased this year compared to last year
- Most businesses observed an upward trend in local, domestic and international customers compared to previous years
- Businesses still keen to maximise benefits from cruise ship visitors through improved efforts to generate more awareness of the Inverclyde tourism offer amongst cruise visitors
- Businesses keen to identify opportunities to grow tourism around developing more water-based activities and events

3.0 RECOMMENDATIONS

3.1 That Committee approves the Review of the Inverclyde Tourism Strategy 2009-2016 attached as Appendix 1.

3.2 That Committee approves the refresh of the Inverclyde Tourism Strategy for 2016-2020 as Appendix 2 and notes the ongoing development required to create a new Inverclyde Tourism Partnership with strategic partners on board to develop and implement a Tourism Action Plan to accompany the strategy.

3.3 That Committee approves and notes the findings of the Inverclyde Tourism Business Barometer attached as Appendix 3.

Stuart Jamieson
Head of Regeneration and Planning

4.0 BACKGROUND

4.1 The Economic Development Service produced a Tourism Strategy for 2009-2016 in consultation with tourism related businesses and services. It was approved by the Regeneration Committee in 2009 with the Action Plan approved at Committee on 3 September 2009 and an update in January 2013.

4.2 The review of the Strategy has shown that there has been a positive steady upward trend in the economic benefit of the tourism sector to the economy of Inverclyde over the 7 years duration of the Strategy and the main objectives set out in the action plan have been met.

4.3 The tourism sector in Inverclyde continues to be heavily reliant on the day visitor market and the product offer is very diverse including leisure, arts, accommodation, hospitality, attractions and extensive areas of public realm.

4.4 The development of tourism in Inverclyde continues to be seen as a major opportunity to change perceptions of the area and create a more positive profile and image.

4.5 The aim of the refreshed tourism strategy will be to provide the framework, direction and focus for all Inverclyde tourism activity over the next 4 years to allow the local tourism sector to maximise opportunities through joint working and seek to significantly increase the impact of tourism in Inverclyde by 2020.

5.0 PROPOSALS

5.1 To approve the refreshed Tourism Strategy for 2016-2020.

5.2 To instruct officers to form a new Inverclyde Tourism Partnership which will be made up of key staff from major tourism businesses operating in Inverclyde. The ITP will be responsible for the creation of an Action Plan to deliver the Tourism Strategy and will identify resources and outcomes to be delivered by 2020.

6.0 IMPLICATIONS

Finance

6.1

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A	N/A	N/A	N/A	N/A	Allocation for tourism expenditure included within existing Economic Development budget.

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

Legal

6.2 N/A

Human Resources

6.3 The strategy will be managed by the Business Development Team Leader.

Equalities

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

Repopulation

6.5 No implications.

7.0 CONSULTATIONS

7.1 No further consultation required at this stage.

8.0 LIST OF BACKGROUND PAPERS

8.1 Appendix 1 – Review of the Inverclyde Tourism Strategy 2009 – 2016

8.2 Appendix 2 – The Inverclyde Regional Tourism Strategy 2016-2020

8.3 Appendix 3 – Inverclyde Tourism Business Barometer 2015

Inverclyde Tourism Strategy 2016-2020

Review of The Inverclyde Tourism Strategy 2009-2016

A *written account and summary of findings, outcomes and consultations influencing the draft 2016-2020 Inverclyde Tourism Strategy*

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THE OBJECTIVES

This commission sets out to achieve the following key tasks:

1. Carry out a review of the 2009-2016 Inverclyde Tourism Strategy/Action Plan in line with key national, regional and local economic development and tourism 'drivers' and deliver a report on outcomes/deliverables achieved.
2. Refresh the Inverclyde Strategy Action Plan to cover the period 2016-2020 in line with the Scottish Tourism Strategy Framework for Change and identify resources required and targets/outcomes to be achieved.
3. Refresh the outline projects for each of the actions identified with targets (including benchmarks and indicative resources required) for delivery within a four-year time frame.
4. Review and refresh, if appropriate, the set of key economic indicators which are used to measure the impact of the Action Plan.

This document sets out items 1-3 with a draft strategy outlined within a separate document.

INTRODUCTION

The Inverclyde Regional Tourism Strategy 2016-2020 (RTS2020) is to be set in a context of regional and national strategies that to a greater of lesser extent; shape, influence, guide or prescribe its objectives and ambitions. The first phase of defining the new Strategy is to undertake an appraisal of the current Regional Tourism Strategy 2009-2016 (RTS2016) and understand its success, reach, influence and place in developing the tourism sector in Inverclyde.

This section, Phase 1, sets out a summarised review of relevant strategies and reports, draws from their objectives and highlights the findings and assumptions that can be considered for onward inclusion and consideration when developing the revised Regional Tourism Strategy for 2016-2020.

Also within this section is a discrete report confirming outcomes against the 14 Measures and commentary against the 6 key Objectives and 52 Actions laid out in the RTS2016.

TOURISM STRATEGIES 2009 – 2016

This section looks at the National Tourism Strategy 2009-2015 and the Inverclyde Tourism Strategy 2009-2016, their setting and reports on the outcomes set against the RTS 2016

National Strategy 2009-2015

At the time of publishing, RTS2016 was influenced by the then current National Strategy. The National Growth Strategy was seen as an overly complicated top down approach with the key measures requiring national agency intervention and therefore disconnected from businesses 'on the ground'.

RTS2016, published in 2009 with 6 Key Objectives and 52 Measures, drew its national alignment from the National Growth Strategy targeting a tourism growth of 50% over the period 2009-2015.

The National Strategy had four main pillars and 14 targets: 1. Knowing your market 2. Exceeding visitors' expectations 3. Marketing your product 4. Being sustainable

Target	Description
1	Creation of a Tourism Research Network and qualitative feedback on its operation
2	Every tourism business, culture and heritage organisation and local authority will collect feedback from their own customers to help them "know their visitor"
3	VisitScotland will increase the proportion of businesses in their Accommodation QA schemes to 90% by the end of 2008, develop and extend QA schemes for more sectors
4	Pride and Passion will double the number of "Friends" each year until 2010, with each friend making a commitment to improving the quality of their product
5	People 1st will work with government and education to ensure industry has the opportunity to get the skills that industry needs
6	The Scottish Executive (now the Scottish Government) will help to provide affordable homes in places where they are needed most
7	The Tourism Innovation Group will foster collaborative working between tourism operators, encouraging them to use innovation tools to come up with creative ideas
8	Tourism businesses will work with local authorities and culture, heritage and sport organisations to set up local product development networks for the heritage, history and events segment of the market

9	By 2007 every tourism business will be on at least the first rung of the e-technology ladder and will continue beyond 2007
10	The Scottish Executive and VisitScotland will study how best to develop a National Box Office which will provide online booking of performances
11	The Scottish Executive will publish a National Transport Strategy in 2006 which will consider all modes of travel and the needs of everyone using transport, including visitors
12	Tourism businesses, culture and heritage organisations, local authorities, VisitScotland and visitscotland.com will use effective marketing techniques to increase the number of visitors who come to Scotland
13	Tourism Businesses and VisitScotland will increase the membership of the Green Tourism Business Scheme each year, so that by 2010, 30% of businesses who participate in the VisitScotland QA scheme are also at entry level or above
14	A Sustainable Tourism Partnership will be set up from March 2006, building on the Tourism Environment Forum, to promote sustainable tourism throughout Scotland

As commented above the National Strategy of the time was seen to be disconnected from tourism operators and one that set targets for supporting public sector bodies rather than operating tourism businesses.

Inverclyde Regional Tourism Strategy 2009-2016

Aligned with the National Strategy approach, the Local Regional Tourism Strategy 2009-2016 and Action Plan (RTS2016) had 14 Measures, 6 key Objectives and 52 Actions.

Six Key Objectives

Key Objective 1

To develop quality market information

Key Actions

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

Key Objective 2

To exceed visitor expectations

Key Actions

1. Invest in the development of skills and training for staff to ensure that customer expectations are exceeded
2. Develop a consistently high standard of customer service excellence
3. Encourage participation in Visit Scotland quality schemes by all tourism businesses
4. Encourage the development of local inspirational managers and leaders in tourism businesses
5. Improve access and transport links
6. Improve public realm areas
7. Improve built environments (remediation of derelict land and decaying infrastructure)
8. Develop consistent and comprehensive visitor signage in the area
9. Develop an improved visitor reception area at the Ocean Terminal
10. Capitalise on the assets of the natural environment
11. Encourage participation in the green business scheme
12. Ensure that all tourism development projects adhere to sustainable principles
13. Develop and promote a clean and green Inverclyde
14. Encourage a sense of "Pride in Inverclyde" for local people to become ambassadors and informal promoters of the area
15. Co-ordinate and distribute up to date tourist information to all tourism outlets
16. Support and develop The Inverclyde Tourist Group who potentially will form the support/outreach for the Inverclyde ambassadors
17. Develop and deliver a programme of local Inverclyde "Welcome Host" type awareness courses for all involved in tourism

<u>Key Objective 3</u>

To develop effective partnerships for tourism in Inverclyde

Key Actions

1. Identify potential members and establish the local area tourism partnership for Inverclyde
2. Gather and disseminate to all businesses and communities, a comprehensive set of information about tourism products and operators in the area
3. Identify, develop and work with the third sector and local communities to create more information providers and tourism ambassadors
4. Ensure that tourism is recognised by all Alliance partners and included in all relevant strategies and plans including the Arts Strategy
5. Work with schools to encourage the development of tomorrow's ambassadors
6. Develop close partnerships between tourism industry and education
7. Work to Develop and work in partnership with the Inverclyde TRAL (Tourism/Retail/Arts/Leisure) group

<u>Key Objective 4</u>

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

Key Actions

1. Recognise and build on existing assets

2. Assist with the development of new products and services by encouraging innovative ideas
3. Gather, disseminate and share customer feedback
4. Assist and encourage tourism businesses to start up, grow and develop
5. Develop leadership skills amongst tourism businesses
6. Develop and promote a range of quality events and festivals
7. Develop collaborative projects with our neighbours
8. Encourage participation by all tourism providers in the Visit Scotland Quality assurance schemes
9. Improve and develop existing visitor attractions
10. Promote tourism as a long term career choice through college, schools and Jobcentres
11. Develop town centres and retail facilities
12. Develop safe cycle and walking routes in the area
13. Develop a range of new water and land based activities
14. Develop sports and recreation facilities
15. Develop a minimum E-business capability for all tourism operators
16. 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

1. Develop and implement a brand strategy to position and differentiate Inverclyde from surrounding areas
2. Create targeted marketing campaigns to focus on niche market opportunities such as sailing, cruise liners
3. Identify and actively promote the unique selling points for Inverclyde to appropriate segments of the market
4. Proactively market both water and land based leisure activities
5. Proactively market all Inverclyde events and festivals
6. 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
7. 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

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

In addition the Action Plan set out:

- The Action Plan will focus on certain key areas aligned with the strategy:
- Providing strategic direction to the industry.
- Focus on expanding markets.
- Attracting visitors by building a successful Inverclyde tourism brand.
- Engage and work in partnership with the tourism industry.
- Developing the skills base.
- Utilise expertise with James Watt College of Further & Higher Education to develop research centre of excellence.
- Enhancing the visitor experience.
- Improve and support product development.
- Linking with other sectors - including food and transport.
- Increase capacity of quality accommodation.
- Increase the capacity of tourism businesses.
- Ensure benefits arise from the Regional Park.
- Develop initiatives around Visit Scotland and Event Scotland initiatives
- Develop Discover Inverclyde, where all stakeholders support each other in growing the market locally.
- Play to our area strengths particularly in environmental / green tourism markets and in the adventure sports sector.

Baseline Indicators

The current strategy set out 10 measures and targets. The outcomes achieved against each is confirmed as follows:

(Prices Historic)	Source	Baseline 2009	Target Value	Actual Outcome	+/- to Target
Revenue (£, M)	STEAM	£42.23	£52.77	£60.08	14%
Visitor numbers (,000)	STEAM	500	503	552	10%
Tourist days (M)	STEAM	1.062	1.100	1.131	3%
Total employment (FTEs)	STEAM	918	900	984	9%
QA Members	VS	9	10	28	180%
Eat Scotland Members	VS	0	2	5	150%
No. of tourism businesses	Discover Inverclyde	100	102	100	100%
Number of experience packages	IC	0	4	4	-
No. Visitor Attractions	Moffat	4	7	8	14%
Visits to visitor attractions (,000)	Moffat	115	140	555	396%
GTBS Businesses	GTBS	1	2	2	100%

In addition to the information tabled above, the following chart provides a breakdown of the make-up of the GTBS accredited business, by sector, based in the Inverclyde region.

Green Tourism Business uptake in the Inverclyde region:

Sector	**Gold**	**Silver**	**Bronze**	**Awaiting**	
Activity Provider					
Bed and Breakfast					
Conference Venue					
Corporate					
Guest House					
Holiday Park / Campsite					
Hostel					
Hotel					
Self Catering					
Tourist Information Centre					
Visitor Attraction		2			2
Total	**0**	**2**	**0**	**0**	**2**

INVERCLYDE TOURISM STRATEGY 2016-2020

In looking ahead to the development of the Inverclyde Tourism Strategy 2016-2020, the study is assessing aligned strategies on both a national and local level that can help shape and strengthen the final approach.

National Strategy Tourism Scotland 2020

The National Strategy *Tourism Scotland* 2020 was launched in June 2012. The Strategy was developed to target those markets that offer the greatest growth potential, to collaborate within and across Scotland's tourism destinations and to develop the authentic memorable experiences which today's visitors seek, and delivered to the consistently high quality they expect.

TS2020 Targets for Growth

Tourism Scotland 2020 identifies four markets where opportunities for growth are possible:

- **Home Turf - £3127m to £3568m**: England, Scotland, N. Ireland, Wales
- **Near Neighbours - £731m - £875m to £1035m**: Scandinavia, Germany, France, Spain, France, Netherlands, Italy
- **Distant Cousins - £414m to £505m - £598m:** USA, Australia, Canada
- **Emerging Markets - £33m to £70m - £83m:** India, China, Russia, Brazil

TS2020 Key Performance Indicators

Tourism Scotland 2020 has identified five key performance indicators (KPIs) which will help measure progress towards this goal, namely to increase:

1. Visitor spend by £1bn from £4.5 to £5.5bn by 2020
2. The advocacy score for Scotland from 25%
3. Average visitor spend from £358.56
4. Total tourism employment figures from 185,100
5. Total tourism turnover from £6,221m

In turn TS2020 is broken down into the following

Developing our Assets

Key to achieving our growth ambitions will be turning Scotland's tourism assets into the more rounded, added value experiences that today's visitors want. We need also to develop assets in response to specific market opportunities.

Nature and Activities

Nature-based tourism is estimated to be worth £1.4bn (*Scottish Natural Heritage, 2010*) to the Scottish economy. Year after year, visitors tell us that our scenery and landscape are the main reasons for visiting. We are seeing too an increasing number of visitors enjoying the many different outdoor activities available, such as walking, cycling, mountain biking, sailing, wildlife watching, fishing and stalking, to name but a few.

Tourism Scotland 2020 identifies 'Nature and Activities' as a key asset for Scottish tourism and to develop this further, the sector has been divided into five working groups:

- Adventure and Wildlife
- Country Sports
- Golf Tourism
- Leisure Cycling Tourism
- Marine Tourism

Events and Festivals

The 'Events and Festivals' sector is very diverse and is identified in TS2020 as a key opportunity. The focus of the 'Events and Festivals' strategic activity is through the framework 'Diary, Dialogue and Development'.

- Diary: The importance of a well-signposted 'Diary' of events and festivals cannot be over-stated. A single portal, with all events which everyone contributes to, and which collectively we continue to encourage improvement.
- Dialogue: The Scottish Events and Festivals Association (SEFA) was launched in 2013 as the trade body to lead and represent organisers, promoters and suppliers involved in the festivals, events and tourism industry while, simultaneously, looking to enhance the professionalism of the industry and promote best practice.
- Development: In setting the 'Development' agenda, TS 2020 is looking to target 10 key capability areas: leadership and team-playing, knowledge management and market intelligence, marketing and sales, quality and customer service, innovation and entrepreneurship, collaboration, sustainability (economic, social and

environmental), training and development, ICT and connectivity, finance and investment appraisal.

Destinations Towns and Cities

A destination is at the heart of the visitor experience and is key to the successful delivery of Tourism Scotland 2020. Destinations are where the visitor eats, sleeps, discovers and explores.

At a national level, across Scotland's many distinct destinations, five themes were identified, namely:

1. National Framework: Build a coherent and widely understood approach to destinations and their role in delivering the Strategy.
2. Funding Alignment for Destinations: Align funding to TS2020 priorities for destinations.
3. Joining Up Destinations – Sharing Ideas: There is much to be learned from sharing ideas and approaches between the different tourism groups. A destinations sub-group is being developed as part of the STA Council. This group will discuss common issues and look at the key opportunities for associations.
4. Destination Development Toolkit: A possible refresh of the existing destination development toolkit, developed by Scottish Enterprise.
5. Customer Journey Checker/Barometer: There is currently no widely implemented measure of customer experience. Discussions have begun on how to measure the quality of the customer journey, at a destination level, along with business trends.

Business Tourism

The expectation within the Business Tourism sector is one of growth thereby supporting the overall strategy growth ambition. Benchmarking is currently underway by MPI Europe to identify the value and growth potential within this sector. While trading is challenging, there is a desire and a want within the industry to focus and plan for year on year growth. It is recognised that it may be a challenge for some businesses to support and deliver Business Tourism.

As Business Tourism is expected to be one of the main drivers of growth, our centres of excellence (20 higher education institutes, universities and colleges) which are globally renowned and competitive, are THE critical group of assets and drivers on which we can "home-build", retain and win new conferences and meetings for Scotland.

Our principal conference centres, hotels, and support services are demonstrably competitive in the Business Tourism market. At the higher end, growth is held back by lack of capacity in meeting space and hotel beds, or both, as an increase in the former requires an increase in the latter.

An industry group – *Business Tourism for Scotland* – has been set up to develop, deliver and communicate the agreed Business Tourism Strategy action plans with the Business Tourism industry throughout Scotland on an on-going basis.

Culture and Heritage Tourism

Culture and Heritage Tourism in Scotland has benefited from an ethos of sharing, collaborating and learning. It has a good track record of collaborating at VisitScotland Expo and joint ticketing for heritage properties in Scotland. This has been through the Historic Properties Group and, under the auspices of the new Historic Environment Strategy for Scotland, this group has reformed as the Heritage Tourism Group with the specific task of developing the *TS2020 Action Plan for Heritage Tourism*.

The group will develop a strategy to 2020 for Heritage Tourism. An initial 3 year action plan, running from 2014 – 2017 (the focus year of History, Heritage and Archaeology), will be a foundation for the longer term strategy.

The group is exploring digital opportunities, securing better access to data and research, increasing the demographic spread of visitors and seeking to secure more tourism benefits from educational visits and tours. In particular, the strategic approach will focus on:

- Turning our Historic Property Assets into Experiences: National level, cluster (with DMOs) and property by property. Activities will consider events and festivals and themed tours and itineraries.
- Improving the Customer Journey: Information provision, digital media, transport links, heritage, accommodation and food and drink.
- Building our Capabilities: In particular, a focus on marketing and skills development.

Skills and Quality

The National Strategy: *Tourism Scotland 2020* outlines that *'gaining and enhancing the relevant skills, knowledge and customer-focused attitude required to deliver consistently high quality visitor experiences'* is a key priority in order to develop Scotland's offering.

Skills Development Scotland, working closely with the Scottish Tourism Alliance (STA), the STA Leadership Group, and the Tourism Skills Group have developed the *Skills Investment Plan (SIP*) for the sector.

The purpose of the SIP is to support the delivery of *Tourism Scotland 2020* and the growth of the industry by attracting more people into tourism as a career and to develop skills and leadership within the industry.

The SIP sets out the key skills priorities that the tourism sector must address to achieve its potential and highlights the key actions needed to address these:

- Improving management, leadership and enterprise in the sector
- Ensuring staff have the skills to deliver a high quality visitor experience
- Raising the attractiveness of the sector to new entrants
- Ensuring appropriate and high quality training is available to the sector

Activities to address the Priorities

In addition to the activity already being delivered to help address these priorities, by a wide variety of agencies and training providers, the SIP identified the following key actions to be taken forward by the Tourism Skills Group:

- Invest in local structures to enable businesses to work together, identify skills needs and influence local provision
- Address skills gaps, either through enabling local groups to commission/develop provision to meet needs, or by encouraging uptake of existing provision
- Undertake a mapping of business development provision for the sector, addressing identified gaps and marketing to increase uptake of business development supports
- Initiate a marketing campaign to increase uptake of training that will improvethe visitor experience; including customer service, management and leadership and technical skills

- Develop a programme of activities to use headline events to raise awareness and status of tourism occupations

Food and Drink

Food and drink is an essential component of any holiday. With such a rich larder available, Scotland is well placed to excel in the provision of locally sourced, high quality products for our guests.

Sustainable Tourism

Sustainability is a key strand of the Tourism Scotland 2020 Strategy.

With sustainable economic growth as a goal, a priority is to maximise operational efficiency and environmental performance, minimize impact on the local environment and connect with communities to deliver real benefits.

In 2013, the Scottish Tourism Alliance Council formed a working group to develop a Sustainable Tourism Statement for the Scottish Tourism Alliance and its partners. The statement identifies eight sustainable tourism objectives. These Sustainable Tourism Objectives are:

1. Growth: Capitalise on the growth opportunities associated with sustainable tourism
2. Transport: Reduce the impact of tourism transport
3. Waste and Resources: Minimise tourism resource use and waste production
4. Natural and Cultural Heritage: Protect and enhance Scotland's natural and cultural heritage
5. Communities: Enhance the quality of life for Scottish communities
6. Employment and Skills: Improve the quality of tourism jobs
7. Accessibility: Make holidays in Scotland accessible to all
8. Climate Change Adaptation: Support adaptation to climate change in the tourism sector

Digital Connectivity

As more and more tourism information moves online, there is a need to make sure that Scotland is meeting customers' expectations of digital service provision.

In VisitScotland's 2011/12 Visitor Survey, *visitors' satisfaction ratings of the availability of mobile phone reception and wi-fi/broadband reception were 3.7 and 3.5* (out of 5.0) respectively.

An industry report, completed in October 2013, identified the need to improve the existing digital training programmes available to tourism businesses by making them more joined up and tourism specific. VisitScotland, Highlands and Islands Enterprise, Scottish Enterprise, Scottish Government and Scottish Tourism Alliance are now working together to ***develop an** integrated, tourism sector-specific digital support service*. The agencies' digital and tourism teams are represented to ensure knowledge and expertise from both sectors are integrated to maximise the success of the programme.

Building on our Capabilities

In order to develop quality, authentic tourism experiences that meet the needs and wants of our markets, the industry must also build the capability of our businesses, and the industry as a whole, in two key areas:

1. Leadership and Collaboration
2. Marketing

Home Turf Key Characteristics

When considering the Growth markets for the Inverclyde area region the following observations as identified through the TS2020 will be considered:

↑ Largest market

↑ Staycation trend. Opportunities to build on visitors' recent positive experiences

↑ All year round overnight and day tourism

↓ Established with little dynamic growth

↓ Keen overseas travelers so need reassuring that quality travel is possible at home

↓ The increasing costs of motoring

↓ Spending cuts affecting employees' leisure travel and organisations' business travel

Near Neighbours: Key Characteristics

↑ World's biggest outbound travelers, mostly within Europe

↑ Touring and city holidays popular

↑ Nearby and have good annual leave and public holiday entitlements

↓ Competing with other well-connected European destinations

↓ Few "flag-carrier" as against "low-cost" direct flights

↓ Tendency to prefer July/August holidays

Distant Cousins: Key Characteristics

↑ Strong diverse economies with large growing travel markets

↑ Historic and familial ties. VFR (visiting friends & relatives) and ancestral are particular drivers. Can lead to repeat visits

↑ Offer experiences different from home – mix of activities and scenery with heritage and history

↑ Generally visit for longer and spend more

↓ Most foreign travel stays within region

↓ Limited direct scheduled flights. Stopovers compete for visit duration

Emerging Markets: Key Characteristics

↑ Growing affluence

↑ Like touring holidays and a warm welcome

↑ High end opportunities – but good deals still sought and mid-budget demand growing

↑ Scotland is distinctive and different. Status of golf, whisky etc. with the affluent

↑ Growing business travel and extended opportunities

↓ Very diverse and sometimes particular requirements

↓ Tendency to travel within region

↓ Strong European competition

↓ Ease and cost of getting visas and lack of direct flights

ALIGNMENT WITH INVERCLYDE REGIONAL STRATEGIES & RESEARCH

The following section aims to highlight the key findings, comments and observations drawn from local strategic reviews or strategies that are recent or active. The objective is to identify key findings and supportive matters leading to the consultation phase with local stakeholders and to serve as a reference, supporting subsequent assumptions or targets for action. This approach allows the final outcomes to be based upon recent face-to-face feedback from practicing trade operators, agency staff along with the wealth of background data and commentary that is currently available.

Inverclyde Economic Development & Regeneration Single Operating Agreement 2014-2017

The Inverclyde Economic Strategy 2011-2014 has been superseded by the Inverclyde Economic Development & Regeneration Single Operating Agreement 2014-2017.

The key themes identified from the wider context of the national frameworks have been identifies as:

1. A focus on growth sectors, markets and companies
2. Building Skills base as improving employability
3. City Regions as engines of economic growth
4. Community led regeneration
5. The transition to low carbon economy

The above is set against a context of:

- European: Grants assisted area
- Cross Border: Opportunities to strengthen 'Borderlands' economy
- National: A context of community empowerment and rural growth along with Scottish Enterprise and Skills Development Scotland supportive roles

- Regional: Single Outcome Agreement and Community Planning partnership identifies development of young people and stimulating the economy. The Local Development Plan allocation of land to meet business needs for next 20 years

Stakeholder views

- Longer term approach to economy
- Priorities/resources
- Leadership to improve confidence and wider participation
- More cohesive approach to attracting private sector investment
- Public sector more responsive to business needs
- Improvement to broadband

Water Access Study October 2014

The key findings and matters of note are:

- Inverclyde is adjacent to some of the best water sports in Scotland
- It share boundaries with Argyll and North Ayrshire both of which actively market water activity and have developed strong tourism led strategy
- Current infrastructure is poor. Publically accessible slipways are all in a stare of disrepair

Further to the 2014 study the Marine Tourism Strategy Awakening the Giant has been published. Within that strategy there are clear opportunities for the area to engage closer with the stakeholders.

Discover Inverclyde Business Plan

Discover Inverclyde, is a not for profit, voluntary run DMO to encourage member companies to improve the awareness of Inverclyde to the community and to its visitors, and by undertaking festivals, events and other promotions working relationships with many bodies including Inverclyde Council, Riverside Inverclyde, the Inverclyde Tourist Group, Visit Scotland and other groups.

The Business Plan 2015-2017 highlights the following key objectives:

- The Coastal Heritage trail

- The Greenock Town Trail
- New promotional screen and associated equipment
- Packaged tourism incentives – Golf & Stay, Sail & Stay
- Tourism literature – Places to Stay in Inverclyde, Passport to Inverclyde
- Other promotional activities eg Taste of Inverclyde promotions, bollard and poster signs
- Advertising initiatives eg Scotrail poster arrangements

DI seek to support: Annual Festival of Heritage, Festival on a pirate theme, Food festival and special promotions, Film festivals, Book festivals, Folk music festivals, Classic Car Rally/ Festival of Speed, Christian and Music Festivals, Red Bull Speed boat race, Red Bull balloon race, Red Bull diving championships, Red Bull air show/aeroplane competition, Annual MAG motorbike rally, Heritage of Steam Rally, International pipe band championships and the Tall Ships race.

Concerns remain regarding tha ability for DI to fully deliver the Business Plan. As a small voluntary based group the challenges are plain to see.

VisitScotland Tourism Development Framework for Scotland

In July 2013 VisitScotland published the Tourism Development Framework for Scotland which considered the role of the planning system in delivering the visitor economy. The document set out to support the ambitions of the TS2020 Strategy by way of highlighting to local authority planning managers, proactive positions that could be adopted around the reception of local applications, and where possible, to proactively encourage support development. The Framework presents a number of actions as a Development Framework 2020 for local and national stakeholders operating in the visitor economy. The Framework follows the key priorities of the TS2020 and is based on two key themes:

Improving the Customer Journey

1. Digital Connectivity
    - Ensure that the needs of the tourism economy are effectively catered for in all plans
2. Transport
    - Working with stakeholders, VisitScotland will encourage the introduction of a smart and integrated ticketing system, initially at all gateways into Scotland and then across Scotland
    - Greater connectivity at Scottish airports
    - Review transport interchanges to all modes of transport
    - Improve mainline stations to enhance visitor experience
    - Improvements to ports to enhance visitor experience
    - Identify growth opportunities in the cruise market
    - Encourage take up of ferry travel
    - Encourage take up of rail travel
    - Improve connectivity along strategic visitor routes
    - Development of scenic tourist routes
    - Improve coach and bus connections to recognised tourist destinations
3. Accommodation
    - Local authorities to consider further accommodation requirements where there is evidence of market demand
    - Identify locations around conference and business tourism
    - Identify investment of country house hotel product

- Set policy to encourage investment in holiday parks, self-catering, and bunk house style accommodation
- Identify opportunities for urban and rural resort development

4. Food and Drink
   - Develop food forums and supporting infrastructure
5. Nature Heritage and Activities
   - Investigate development opportunities along designated path networks to enhance their tourism potential
   - Consider the potential of forests and woodlands through allocation of development opportunities in Local Development Plan
   - Consider potential of marine based development strategies along with allocation of suitable areas
   - Upgrading facilities at existing golf clubs
   - Potential of development of cycling infrastructure
   - Upgrade of country sports facilities to meet wider tourism demand
   - Identify growth of outdoor sector
6. Destination Towns and Cities
   - Promote appropriate growth of visitor economy in (NP) and areas of conservation
   - Consider regeneration of infrastructure to support evidence based demand for museums and galleries
   - Support successful arts venues development plans
   - Encourage improvements of the public realm at transport gateways
7. Business Tourism
   - Expansion of evidence based developments for exhibition, conference and business tourism sites, supported by provision of sufficient 3star + accommodation

8. Events and Festivals

    - Consider infrastructure requirements to support market demand in existing destinations

Destinations Tourism; Cruise Liner Opportunities

In May 2015 a workshop took place to consider the potential of the Cruise market for the area.

WHAT THE CUSTOMER WANTS

Many people chose to take day trips to key Scotland locations such as Glasgow, Edinburgh or Loch Lomond. The key opportunity was among those who chose to stay locally and explore, crew from the ship and also from tourists returning from half day trips or killing time prior to going on afternoon trips. The key message was that although customers were time pressured they valued authentic Scottish experiences and engagement with locals.

Inverclyde have a strong asset in the local tourism group who have representatives that meet the cruise ships at the port and provide a welcome and information to facilitate their visit and help individuals explore the local area. This group of volunteers provide differentiation from other ports where the first impressions are often a crowded environment with a range of people trying to sell to tourists.

In discussion groups key elements of customer needs identified included:

- Warm welcome and geniality
- Short, authentic experiences e.g. Live music
- To meet locals and engage with Scottish people
- Scottish Food and drink / street food
- Souvenirs
- Strong interest in genealogy from US cruise markets
- Currency (accessing and acceptance of)
- Information – succinct, clear and easy to digest (don’t want too many choices)

- Wi-fi
- Options of things to do
- On- line booking options in advance
- Hands held (in a new place are uncertain of surroundings)
- Practicalities (opticians, pharmacy, clothing etc)

CREW / REPEAT VISITORS AS CUSTOMER

Crew often wanted more practical things such as food and household shopping and were keen to try different food types and find places to spend time off board (pubs, cafes).

Repeat visitors also sought more localised experiences with value for money as a must. This group were identified as strong advocates for local experiences and businesses given they would tend to talk and share experiences on board and connect with other tourists arriving at the destination.

BARRIERS / ANCHORS

The core barrier to engagement with tourists from the cruise ships was identified as time, with a majority keen to experience core Scotland attractions such as Glasgow and Edinburgh many were left with limited time in the destination.

It was stated that a large proportion do half day trips and there was an opportunity to engage with them before or after these. The proximity of the town to the dock was seen as a unique asset for Greenock.

For those who chose to stay locally information on what was available in Greenock and a lack of prior information was identified as a key barrier to optimizing their time and experience on arrival.

One group discussed at length the confusion between promoting Inverclyde and not Greenock as a destination and felt that a more targeted offering around Greenock would be key to helping this group access information about activities and things to do on arrival and could provide a gateway to the wider region.

Other key barriers to growing tourism spend from cruise liner visitors identified in groups included:

- Opening Hours – especially for Sunday arrivals and late night arrivals

- Empty shops and buildings, first perceptions of town (litter, buildings and safety)
- Taxis (are keen for larger fares, don’t take people on local tours)
- Lack of collaboration and coordination between businesses
- Lack of prior information - Greenock vs Glasgow v Inverclyde
- Language barriers
- No formal visitor centre beyond the terminal
- Getting info to passengers / no on-board promotion
- Weather
- Costs of participating and working with cruise liners
- Small % of tourists staying in area
- Council spend and engagement with tourism

OPPORTUNITIES INFORMATION

Getting information to people in advance of arrival is critical. People researching pre arrival – information at this point is critical many groups felt that the region needed a stronger representation online prior to the point of arrival.

Information kiosks in town were also seen as an opportunity to help direct people once they had left portside.

- Understand what people are searching for pre arrival (Google Search terms) and also which review and booking websites they are using
- Inverclyde app or optimized website for pre arrival
- Providing a map with times to places shown may help allay fears around time constraints and straying too far.
- Augmented signposting to help people feel secure when navigating town and encourage explorers,

- Many suggested that a guided route into center so that walk is safer and shows the best of the town to those arriving

POTENTIAL SHORT TERM ACTIONS

Inverclyde tourism group highlighted availability of their printed map to individual businesses should this be of use, this was a non-commercial printed map that featured key attractions and walks in Greenock.

- Shared information on arrival dates, times and special events
- Individual businesses highlighting experiences /products timed for cruise passengers on websites
- Individual businesses encouraging reviews on www.tripadvisor.com / www.cruisecritic.co.uk or www.cruiseline.com
- Shared social media streams or terms (e.g. Twitter hashtag) to help open up information

ACTIVITIES

It was felt that offering simple accessible activities would give people a reason to spend more time in the destination.

Some simple activities were suggested including animation in the town during the time ships are docked highlighting traditional activities and skills. Walking trails and interest trails are also a good way to engage with destinations and some of the groups felt that there were strong opportunities around the cultural, industrial and military history of the region that were not as yet being fully exploited. Other suggestions focused on more active propositions such as cycling or jogging trails, these would offer arrivals a means of exploring more of the region within the set time frame. A lot of discussion was held around which businesses / organisations were most likely to provide these and whether they were likely to be guided or non-guided.

- Animation in town e.g. live music, storytelling session, demonstration of traditional skills, weaving / dance
- Cycle hire and cycling trails

- Themed itineraries e.g. Maritime History, Industrial and Genealogy Trails
- Sugar house trails / Tours of the Kyles / Open air pool visits
- Suggested itineraries by time blocks (1hr / 2hr / 3hr) time is of the essence
- Off and on tour buses, Shuttle bus to Cathcart st
- Fishing tours / boat experiences / cruise within a cruise
- Take facilities to visitors
- Ability to book in advance

POTENTIAL SHORT TERM ACTIONS

- Experience providers to trial products for cruise liner market – advertising directly to potential clients
- Links to ground handlers to be made for those looking to collaborate on formalized packages
- Businesses to trial animation or activities during cruise liner visits
- Sharing information on these and advertising to a wider audience (locals, local tourists, tourist group)

RETAIL / FOOD AND DRINK

The idea of pop up retail and farmers market was discussed in almost all of the groups. It seemed logical that given time pressures there was a centralized area or unit where people could access the produce and crafts of the local area in a shorter time frame. Although farmers markets were felt not to really fit with the audience (consumable products, mainly needed food prep to enjoy) it was discussed that this could be adapted to attract both local and cruise liner audiences. Suggestions around tasting experiences and take away items such as craft and confectionary were popular among the groups.

The current retail offering at the terminal was recognized as an opportunity but was felt to be inaccessible to many given that it was limited to 6 units and currently oversubscribed.

Many discussions focused on the long term visions around redevelopment and improved infrastructure in order to augment the customer journey and experience of their Greenock visit. Many people felt that some of the abandoned units and disused spaces offered a strong opportunity for development

Key ideas shared in this area included:

- Farmers market / showcasing local produce
- Pop up shops or stalls on sail days
- Local businesses to accept foreign currency
- Voucher booklet for local businesses
- Onward delivery of purchases
- Shops with A- boards and advertising at portside
- Ability to buy post departure – order online as you sail away

POTENTIAL SHORT TERM ACTIONS

- Individual retail business to look at payment, shipping and online sales provision
- Food businesses to trial taster menus or takeaway packages
- Wider discussion on potential farmers /local market around cruise ship arrivals
- Local voucher scheme or offers – if any exists can they be repurposed for tourist market

COLLABORATIVE ACTIONS

The Local Area Tourism Partnership was highlighted as an existing group who were working around this area and input and collaboration was welcomed from relevant and interested parties.

Some other ideas generated in this area included:

- Lobby banks re currency change
- Offer a concierge service – help people optimize time and get the things they need

- Group website or communication platform
- Unified social media e.g. shared hashtag
- Timely messaging on social media for independent explorers
- Provide copy / info for guide books and media
- One group also mentioned that it would be helpful to look at Orkney, who had won the best Port Award to understand the key criteria for this and identify best practice examples from other destinations who were effectively engaging the cruise line tourism market.

POTENTIAL SHORT TERM ACTIONS

- Look into opportunities or platforms for local businesses to communicate around development
- Unified terms on social media / online to heighten impact of individual marketing efforts
- Increased knowledge share and referral among local businesses

CLOSE OF DISCUSSION / CONCLUSIONS

- Many of these focused around leadership and driving activities in the area and the need for larger infrastructural change or investment.
- It was highlighted that while this was desirable for all the session was focused on looking at the addressable market offered by the cruise liners in the region and how individual businesses and organizations could capitalize on this.
- Whilst many companies still expressed frustration with the business model of the cruise ships and inability to access passengers on board it was recognized that this could not be readily changed.
- Opportunities highlighted mainly involved working around these limitations and building compelling product and reasons for people to spend time and money in Greenock and Inverclyde as part of their Scotland visit.

- It was stressed that the onus lay with individual businesses to identify commercial opportunities from this market and the wider tourism market and capitalize on these accordingly

Consumer Research

VisitScotland Visitor Survey 2011

VisitScotland carried out their last National Visitor Survey across 2011 and 2012. The published information does not include the specific Inverclyde area. The result of which means that it is not possible to undertake a benchmarking process with other areas and the overall Scotland results.

Every effort must be made to engage with VisitScotland to have an area specific study undertaken.

The key indicators, and their comparison against other areas, will be carried forward into workshop debate regarding the position and propensity to recommend and to return to the area.

VisitScotland QA Businesses in Inverclyde

The number of businesses signed up with VisitScotland under the Quality Assurance schemes is confirmed as follows:

Category	1 Star	2 Star	3 Star	4 Star	5 Star	Await	Total
Hotels	1		2				3
Small Serviced			3	1			4
Self Catering		1	2	1			4
Caravan & Camping				1			1
Visitor Attractions		1	2	12		1	16
Taste Our Best (Standalone)						5	5
Inverclyde	**1**	**2**	**9**	**15**	**0**	**6**	**33**

VisitScotland is currently reviewing the place that QA holds within the presentation and promotion of Scottish tourism product. Work is underway to potentially align with online review sites with announcements due to take place in Spring 2016.

BASELINE INDICATORS 2009-2016

Indicator	Description	Current Source	Baseline 2009	Annual Growth Rate	Target for 2015/16	Outcome 2014/15
Total Revenue	Total spend generated by visitors to Inverclyde	STEAM	£42.23m	2%	£.43.07m	£60.08m
Tourist Days	Number of visitors staying in Inverclyde	STEAM	1,062.09	3%	1093.95	1,131
Day Visitor numbers	Number of visitors to Inverclyde	STEAM	530.08	2%	540.68	552
Total employment	Number of FTE employees in tourism sector	STEAM	918	3%	946	984
Number of Quality Assurance Scheme members	Number of tourism businesses signed up to QA schemes	VisitScotland/ Eat Scotland	VS QA - 9 Eat Scotland - 0	3%	VS 10 ES 2	VS 28 ES 5
Increase in number of tourism/hospitality businesses	Total number of tourism/hospitality businesses in Inverclyde	Discover Inverclyde Membership	100	2%	102	100*
Number of experience “packages” developed	Number of packages developed and marketed	Local data monitor	n/a	1 per annum	4	Unkown
Number of visitor attractions	Number of visitor attractions in Inverclyde	Scottish Visitor Attraction Monitor	4	3%	5	5
Visitor numbers to visitor attractions	Numbers of visitors to Inverclyde attractions (,000)	Scottish Visitor Attraction Monitor	115.5	3%	119	555
Number of green tourism business scheme members	Number of tourism businesses signed up to Green Tourism QA schemes	VisitScotland	2	2%	3	2

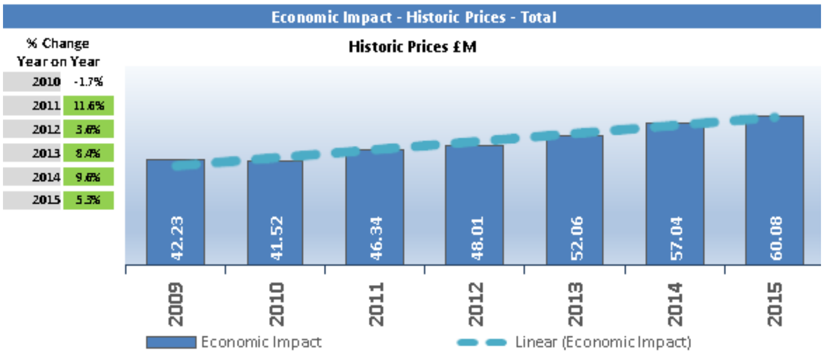
Baseline Indicators - outcomes

The following table summarises the Baseline Indicators set against the 2009-2016 Inverclyde Tourism Strategy:

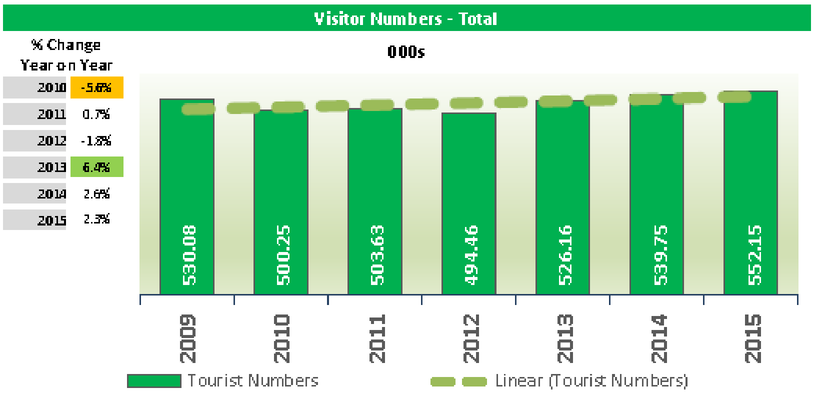
(Prices Historic)	Source	Baseline 2009	Target Value	Actual Outcome	+/- to Target
Revenue (£, M)	STEAM	£42.23	£52.77	£60.08	14%
Visitor numbers (,000)	STEAM	500	503	552	10%
Tourist days (M)	STEAM	1.062	1.100	1.131	3%
Total employment (FTEs)	STEAM	918	900	984	9%
QA Members	VS	9	10	28	180%
Eat Scotland Members	VS	0	2	5	150%
No. of tourism businesses	Disc Inverclyde	100	102	100	100%
Number of experience packages	IC	0	4	4	-
No. Visitor Attractions	Moffat	4	7	8	14%
Visits to visitor attractions (,000)	Moffat	115	140	362	159%
GTBS Businesses	GTBS	1	2	2	100%

STEAM

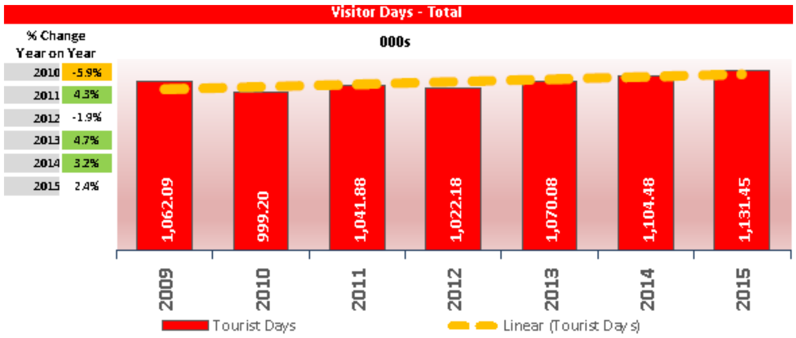
The following offers a snapshot overview of the tourism sector June - June in Inverclyde 2009-2015.



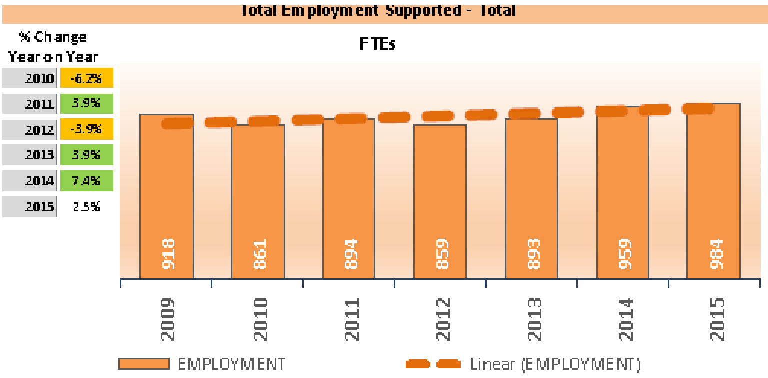
42% increase in tourism values 2009-2015



4% increase in overall visitor numbers 2009-2015



6% increase in tourism days in the area 2009-2015



7% increase in FTEs 2009-2015

DESTINATION DEVELOPER OVERVIEW

The following assessment of the tourism sector in Inverclyde is made using the Coigach Consulting Destination Developer toolkit. The comments below have been drawn from time spent in the area and conversation and feedback from a range of parties.

Pillar	Element	Comment	Commentary
PRODUCT	1. Product	What is on offer by sector, area, seasonally and what is area's USP, tourism assets and missed opportunities?	The area has a distinct maritime association with the cruise ship market, marinas, access to the Clyde along with inland parklands and countryside. In addition, there is a rich heritage tradition in the area along with retail and visitor attraction assets. The area could make more of its maritime location and potential as an access to Glasgow, the Clyde and the West of Scotland. The area could also maximise its place as the departure point for many who emigrated during the early 19th century and so offers the potential of a themed attraction, operating with national status.
	2. Presentation	How is the product presented and promoted in terms of; character, link with neighbours, national campaigns, brand promise, USPs, SEO and digital visibility?	The area does not fare well in Google searches with three sites appearing in the first two pages of listings on veracious holiday and day out search terms. www.discoverinverclyde.com www.inverclydetouristgroup.co.uk, www.cruiseglasgow.com www.inverclyderamblers.org.uk Further work is required to consolidate the digital presence and content of sites when accessed. In addition, a collective approach around accommodation availability, calendars and events listings is required. Social media reach across Facebook, Twitter and Instagram is not strategically managed and, as a result, is fragmented. Further collaboration and resource is required in this area to ensure local businesses are well versed in social media and that some cohesive destination work is

			undertaken.
	3. Experience	Quality of experience and reputation, visitor perception, value for money and referral power generating new and repeat visits.	There is no localised customer feedback mechanism nor does VS undertake a regional customer survey to match the area footprint. Without such research it is not possible to comment upon or evaluate the customer experience ratings or make benchmark comparisons to other areas. Such a shortcoming will unless addressed hamper any form of benchmarking or assessing customer experience.
PLACE	4. Knowledge	Understanding of the customer, trends and the depth of businesses intelligence, capacity and competencies. How savvy are local business in terms of IT, social media, digital, yield management, seasonality building?	The 2016-2020 Strategy (draft) makes specific reference to the need for localised data capture and sharing. The area is not well served in terms of statistical review and gathering of key data. The Business **B**arometer (2015) has made inroads to this matter but specific local customer feedback and marketing data is required to advise business and strategy.
	5. Infrastructure	Through the process of a customer journey of; Look, Book, Travel, Stay and Keep in Touch, can the destination connect the customer with the business at each stage and what mechanisms are in place?	The web based information journey is fragmented with no real 'go to' website supporting or providing potential visitors with localized information. There are strong and well-presented heritage product print guides and the area is fortunate to possess a voluntary group that offers a welcome and greeting to visiting cruise ships. There are however mixed views as to economic value of the cruise ship market for local businesses.
	6. Environs	Association and connection of the streetscapes, public realms supporting the 'sense of place' and brand promise.	The area could further improve the street environs with better signage connecting the sea and waterfront attractions with Greenock town centre and the wider product across the Inverclyde area.
	7. Investment Plan	The identification of capital and revenue investment required to achieve targeted growth.	Significant capital investment has been announced to develop the waterfront. However, there are concerns over revenue support for the sector. This is borne out by the fact that the tourism officer post is being deleted with no clear strategy, widely understood, as to what approach or resource will be in place to co-ordinate and collaborate with the local industry.

PARTNERSHIPS	8. Collaboration	Strength of collaborating networks between business, sectors, towns, areas and public sector agencies along with links locally and with neighbouring areas. In addition, how well does the destination sit within public policy?	The area has three direct tourism organisations; Discover Inverclyde, the Inverclyde Tourist Group and the LATP. As in many areas, the resilience of each is dependent upon voluntary work. There is a great need for a principal private sector body to undertake the lead role in coordinating local business interests. This collaborative role is one that cannot be fully delivered by the private sector and it is one that will require future resource from both public and private sources.
	9. Resource	Resource and commitment to support aspirations through private and public sector investment and structures	There is a feeling and concern within the area that Inverclyde Council, in deleting the Economic Development Officer post responsible for tourism development, is seen to be neglecting local tourism connection and support. In light of the recent outline of the City Deal tourism investment plans for the waterfront, a coordinating and development plan management role should be considered, so as to maximise public and private funding leverage and across the board collaboration.

CONSULTATION

Workshop 24th September 2015

Local businesses were invited to take part on an open workshop. Emails were sent to the full database of contacts. It was agreed to hold the event at the Beacon Arts Centre. A total of 19 people attended the event.

ATTENDEES

1. Jean Benson, Bellevue Bed & Breakfast, Inverkip
2. Tom Bryce, Short Lets Scotland
3. John Cairns, Scottish Fire & Rescue Service Heritage Trust
4. Fiona Carswell, Clyde Muirshiel Regional Park
5. Nicola Falconer, Quigley Architects
6. Claire Jefcoate, Oakmall Shopping Centre
7. Chris Jewell, Discover Inverclyde
8. Fraser Lang, Finlaystone Country Estate
9. Martin Latimer, Blue Sea Marinas
10. Gavin McDonagh, Holt Leisure Parks
11. Arthur MacMillan, Finlaystone Country Estate
12. Sharon Murdoch, Funworld Leisure
13. Rikki Payne, Creative Inverclyde
14. Laura Pearce, Beacon Arts Centre
15. Andrew Pearson, Inverclyde Tourist Group
16. Eleanor Robertson, Inverclyde Tourist Group
17. Lesley Robertson, Seatrek
18. David Shaw, West Coast Cinemas
19. David Stirling, Inverclyde Tourist Group

Alan Rankin and Douglas Ritchie presented with the slide show detailed in Appendix 1

The key maters highlighted from the presentations were:

1. Key indicator outcomes from 2009-2016 Strategy. The draft outline of the results against the baseline indicators were shown to delegates. There was a widely held view that such statistics could be better utilised and shared amongst the industry.

2. National strategy has adopted a more simplified approach to building a strategy around the customer experience where key assets were identified to be the driver for growth. The meeting considered national objectives and how they in turn had now filtered down into sectoral and area strategies across Scotland.

3. Delegates were invited to make open floor comments at the end of the first session. After coffee delegates were split into three tables to discuss three potential avenues that the new Strategy could follow namely;

    - **Developing local authentic experiences**
    - **Improving the customer journey**
    - **Building our capabilities**

4. Representatives from each group were then invited to give feedback on the discussions and on what had been debated during the day concerning three issues:

PRIORITIES FOR DEVELOPING AUTHENTIC EXPERIENCES

- Focus on domestic Scottish markets – day, VFR and overnight visitors. They are the easiest to reach and represent the majority of visitors to Inverclyde. Aim to attract new Scottish visitors and generate more value from existing ones.

- The family market is important to the area. Inverclyde needs to develop "Family Days Out" packages that combine a mix of different experiences that will appeal to all family members.

- 'Daytrip' is the prime target market for the area due to its location and drive-time of major key markets and centres of population.

- Products could be developed along themes of

    a. Event
        i. Cultural
        ii. Arts
        iii. Sports
        iv. Shows
    b. Waterfront
        i. Coastal paths
        ii. Famous ship
        iii. Docks
        iv. Migration, history heritage
        v. Transport history
    c. River
        i. Sailing regatta
        ii. Events (P1)
    d. Inland
        i. Moors, lochs, walks/trails

- Don't put too much emphasis on growing business from cruise markets. They are good for the overall profile of the area as a visitor destination, but offer limited direct benefits to local businesses. This was countered also by discussion around building a more compelling local offer so as to attract cruise ship passengers to stay in the area.

- Inverclyde lacks an iconic 'must-see' attraction that draws visitors into the area. Given this, event development may offer the best and most practical way forward to create additional reasons to visit Inverclyde. Themed events, involving a number of venues and linking into local businesses, may be the type of event development that will generate the greatest additional business.

- Given the lack of an iconic draw, emphasis should be placed on working existing tourism assets more by linking them into easy to access packages that can create a critical mass of different types of experiences that attract additional visitors to the area.

- The area lacks a real identity and core proposition to differentiate it and put in on the map. The area lacks confidence and is still trying to break from post-industrial negativity. Look to other waterfronts that have transformed their area, i.e. Dundee, Bristol and Belfast with the Titanic exhibition.

- To achieve a change of mindset with tourism being seen as a positive contributor to the economy there needs to be buy-in from business, the wider population and the public sector.

- Inverclyde lacks a clear tourism brand or identity that can appeal to visitors and encourage them to visit. Any brand has to link into the experiences that the area offers on the ground. There may be scope to develop a brand around events or around Greenock's position as Scotland's busiest cruise port. The latter could act as a form of recommendation – "*if people from all over the world are coming into Inverclyde on cruise ships, maybe we should go and see what makes it so attractive to them".*

PRIORITIES FOR IMPROVING THE CUSTOMER JOURNEY

- Visitor orientation needs to be improved both to make it easier for visitors to locate facilities and also to encourage them to visit a number of local facilities during their time in the area. Improved orientation could include enhanced welcome and directional signage, the development of apps and interactive maps, and themed trail development.

- Digital communications will be increasingly important. However, there is still significant demand for printed information like maps.

- There is no clear digital portal to the area so the area is poorly served for pre-arrival searches and is missing out.

- As Inverclyde enhances its events portfolio, priority should be given to developing packages around events to increase visitor length of stay and visitor spend. These packages have to be easy to access and well promoted to raise visitor awareness of all that the area has to offer. They also need to encourage repeat visits as well as extended initial visits.

- There are somewhat mixed views on how closely Inverclyde should align itself with Glasgow. Overall, there is recognition that Glasgow is known internationally as a successful, high quality visitor destination and it would be strange for Inverclyde not to try to derive some benefit from that, given its proximity to the city.

- There is a need for a DMO to set up to sell packaged products and bundle local product together.

PRIORITIES FOR BUILDING CAPABILITIES

- Businesses want access to financial support for capital development and marketing activities. It is recognised that there is a need to develop a coordinated approach to funding applications that increasingly will need to be made, on a project by project basis, by groups of local businesses.

- It is recognised that robust statistical data will be needed to support and justify funding applications. At the moment such data does not exist at local level.

- There is support for a new approach to data collection using locally led collection supported by national collection (STEAM, VAM and VisitScotland).

- There is widespread concern about the forthcoming loss of the Economic Development Officer post responsible for tourism development within Inverclyde Council. This position is viewed as providing an essential coordination and communications role for the local tourism industry. There is concern that the loss of this post indicates a lessening of Council support for the local tourism sector.

- There is some interest in setting up a DMO in Inverclyde, perhaps by building upon and enhancing the current role of Discover Inverclyde. However, any DMO will need to develop sustainable income and funding streams to ensure its ongoing operation.

- It is recognised that collaboration and partnership working between local businesses will be essential to build capabilities, improve the customer journey and develop authentic experiences. Leadership is needed to encourage and support the necessary collaboration.

- Greater communication is required to help businesses feel engaged as a group and part of the industry; this does rely on business effort and input to make it happen.

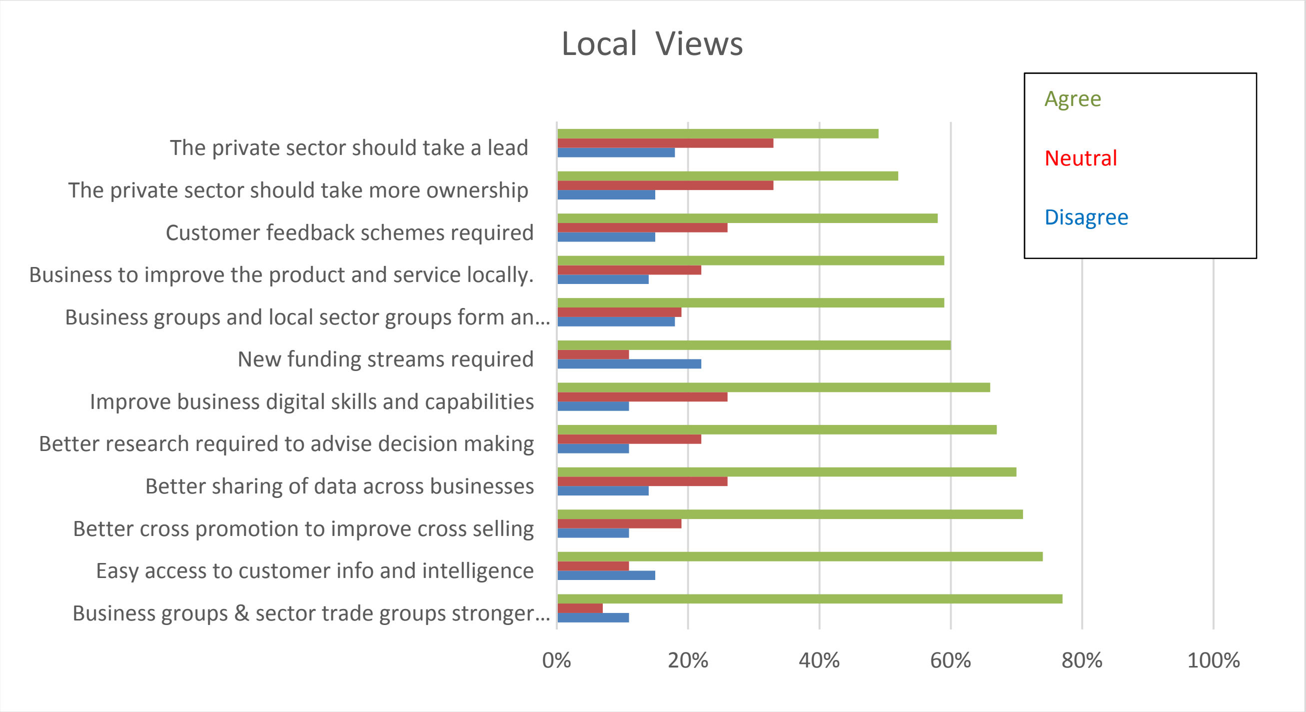
- Greater cross-business and cross-sector communications.

- Need to engage the larger businesses that drive big volumes through the area.

- Future sustainability is critical for any group and is a real challenge. Options for a BID may be considered as the way forward as it creates sustainability for a period of time.

Online consultation

After the workshop an online survey was carried out seeking further input to the conclusions reached at the workshop. Twenty seven businesses responded to the survey and the findings are summarised below.

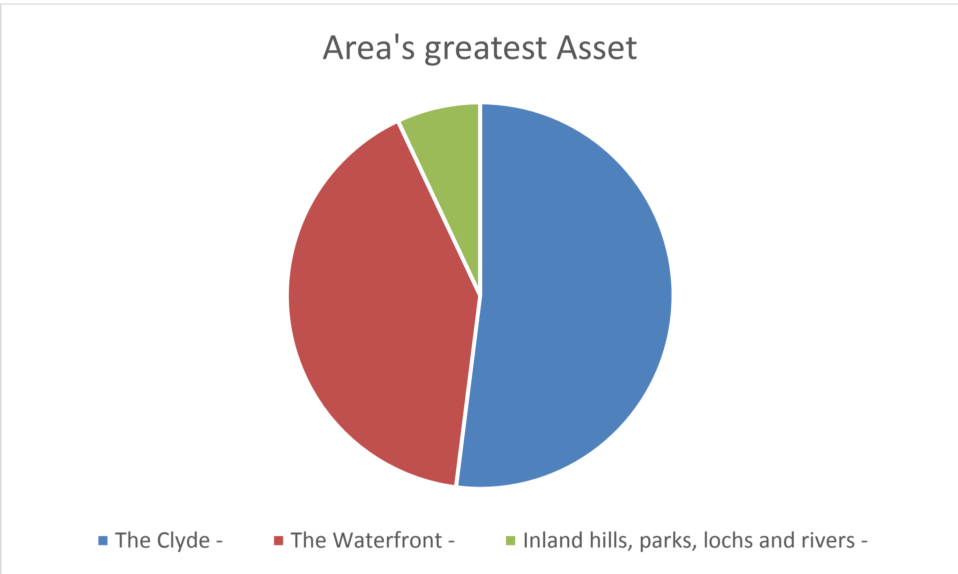


The following presents opinion represented as

‘Strongly disagree, Disagree/Neutral/Agree, Strongly Agree

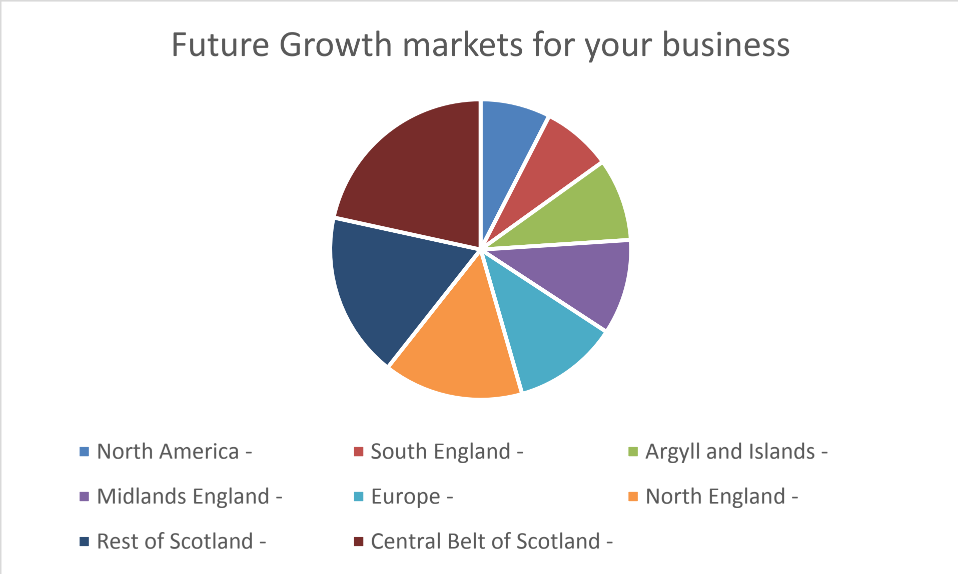
- 18%/33%/49% The private sector should take a lead in developing the local tourism offering.
- 15%/33%/52% The private sector should take more ownership of future tourism strategies.
- 11%/7%/77% Business groups such as Chamber of Commerce / FSB / Discover Inverclyde / Inverclyde Tourist Group (not exhaustive) and local sector trade groups should be stronger involved in the delivery of the new Strategy.
- 18%/19%/59% Business groups such as Chamber of Commerce / FSB / Discover Inverclyde (not exhaustive) and local sector trade groups should form a collaborative alliance to steer the Strategy.

- 14%/22%/59% We need a localisation agenda that sees local groups and towns taking more responsibility to work together to improve the product and service locally.
- 22%/11%/60% In light of ongoing restricted public budgets, we need to find new funding opportunities if innovative projects are led by groups.
- 11%/22%/67% We need a better evidence base to inform our marketing and strategy decision making.
- 15%/11%/74% We require easier access to up-to-date customer information.
- 14%/26%/70% There should be better dissemination of tourism data and knowledge of the local tourism market.
- 11%/26%/66% Tourism businesses need to significantly improve their digital and marketing capabilities.
- 15%/26%/58% Tourism businesses need to identify the customer feedback programmes they will use to better understand the market.
- 11%/19%/71% Tourism businesses need to significantly improve the manner in which they promote and cross-sell other tourism products and events across the area to customers.
- Which, in your view, is the greatest asset for future tourism growth in the area?



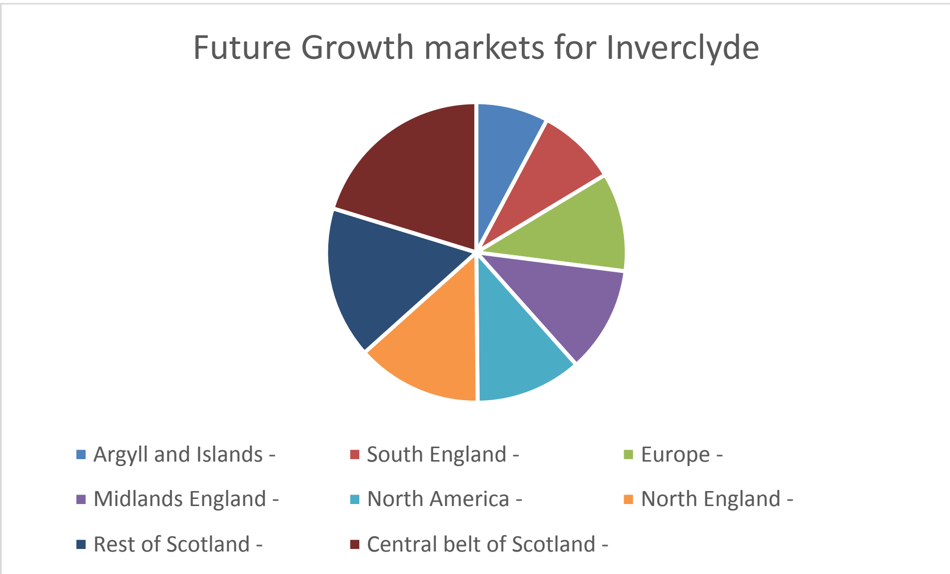
- The Clyde - 52%
- The Waterfront - 41%
- Inland hills, parks, lochs and rivers - 7%

- Which, in your view, are the growth markets for your business, now and in the future?



- Argyll and Islands - 26%
- Central Belt of Scotland - 63%
- Europe - 33%
- Midlands England - 30%
- North America - 22%
- North England - 44%
- Rest of Scotland - 52%
- South England - 22%

- Which, in your view, are the growth markets for the entire Inverclyde area?



- Argyll and Islands - 30%
- Central belt of Scotland - 78%
- Europe - 41%
- Midlands England - 44%
- North America - 44%
- North England - 52%

- Rest of Scotland - 63%
- South England - 33%

The following are written responses from local business people to the online survey open text quations::

- *"Due to the range of individual independent shops and restaurants Gourock, and in particular Kempock Street, has been identified as a unique shopping experience for visitors in a national survey...TV coverage etc. and has been the focus of an editorial titled 'Destination Shopping: Kempock Street, Gourock' in the Scottish Woman magazine (Issue 52: 2015). "*

- *"We have the benefit of one of the two remaining open-air swimming pools in Scotland...an amazing history of Clyde Steamers leaving on day trips from Gourock Pier........much more needs to be made of this ....a well-run Heritage Centre should be established. A local Trail Guide would be great......both in leaflet form and proper signposting.... landmarks with history, nature info. etc."*
- *"I would like to see better conversion of cruise ship passengers to Inverclyde visitors - a better 'Inverclyde' bus tour for example, encompassing local businesses, activities and sites OR including Inverclyde businesses on the way to Loch Lomond for example."*
- *"In order to maximise return Inverclyde needs to identify (say 3) key sectors that will bring the most growth to Inverclyde Tourism, how these ambitions tie in with neighbouring and national strategies and the cost effectiveness/ deliverability of the 3 sectors."*
- *"Inverclyde has huge potential but must create complimentary strategic alliances to deliver increased visits and tourism growth. We need to be a) on the Map b) a key player in the Tourist Economy."*
- *"In recent times the District Council has been the main body to push tourism forward and we have seen an improvement. The private sector has been in the most part disinterested and lacking enthusiasm. If we lose the leadership from the Council then I fear that nothing will be achieved in the future."*
- *"The most important issue of all is that hundreds of thousands of people are visiting Inverclyde and we cannot capitalise on this market already. Something terribly wrong and fishy is going on here. If we cannot see the benefits of this how are we going to entice others here? Providing free tours of Inverclyde is killing potential growth of tourism guides etc. benefiting from their own area. I make most of my money taking people out of Greenock or organising tours from Glasgow and Edinburgh. That is a humiliating accolade for the Inverclyde tourism industry."*
- *"There is already a local meeting group of businesses involving Chamber of Commerce, Council and local tourism businesses. It is called TAP (Tourism Area Partnership)."*

- *“It seems to lack information, enthusiasm and direction. It's not a new body we need; it's action points and following them through. Setting up proper action items such as a local Maritime Museum of Shipbuilding have been discussed for over 10 years. There was talk of moving Clydebuilt (previously at Braehead) to Inverclyde, but nothing has happened.”*
- *“There was talk about using the Custom House as a Centre for Family History, involving the records of all those who left Scotland during the great periods of emigration (Highland Clearances etc.). Similar to Ellis Island in New York. But that never happened.”*
- *“ITG has been heavily involved in giving advice and support to initiatives. We helped develop the Town Trail, Coastal Trail and are currently working on several projects with the Council and TAP. But we need major investment in Inverclyde to turn us into a proper tourism destination.”*
- *“We need the Council to be showing an interest in the part our businesses play in promoting tourism and helping to put Inverclyde on the map as a wonderful destination, for holidays, leisure, business and as a place to stay.”*

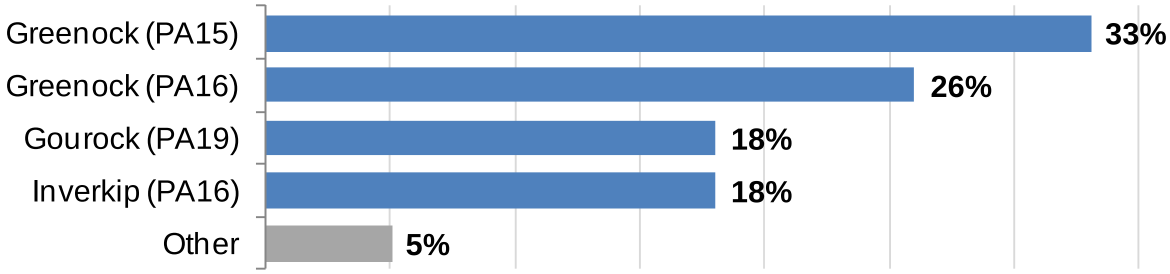
BUSINESS BAROMETER

The area has undertaken a recent piece of research under the title of ‘Business Barometer’. The survey gathers business feedback from local operators and provides further insight to trends and markets operating in Inverclyde. The material represents the best source of up to date information on the tourism sector

Profile of respondents

Methodology	Contacts invited to participate[1]	Number of survey responses	Response rate
Online	65	29	45%
Telephone interview	39	13	33%
Overall	**69**	**42**	**61%**

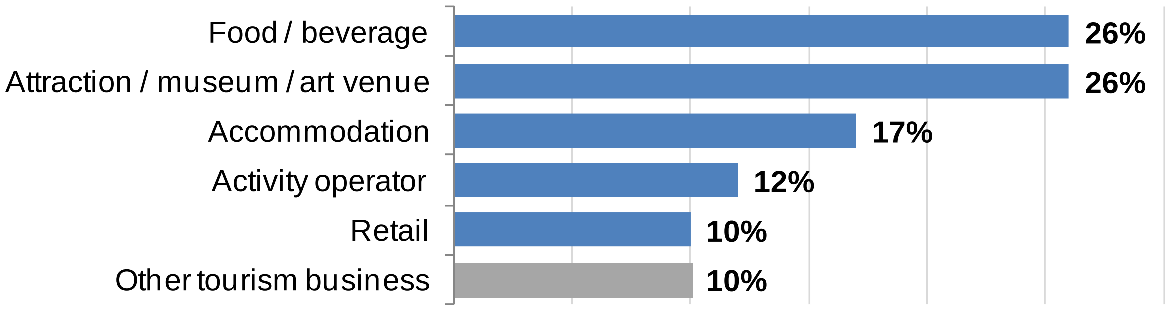
Business location



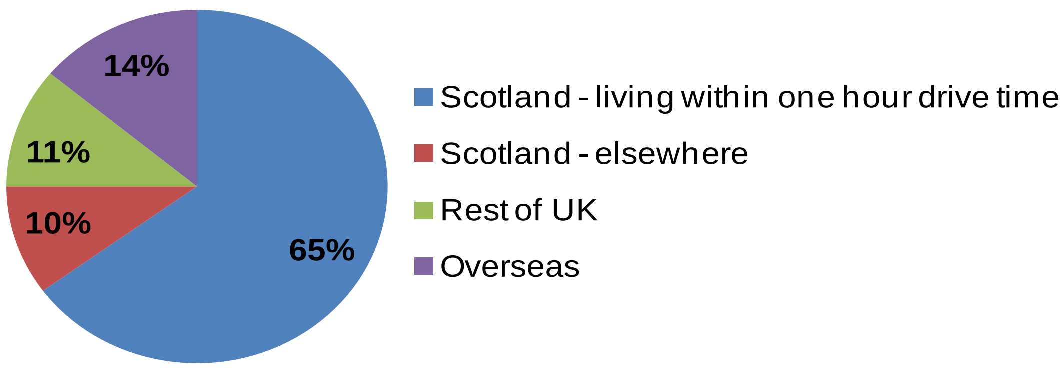
Business sector

A good spread of business types contributed their views to the research. As can be seen below, catering businesses along with attractions / museums / art venues accounted for over half of the responses.

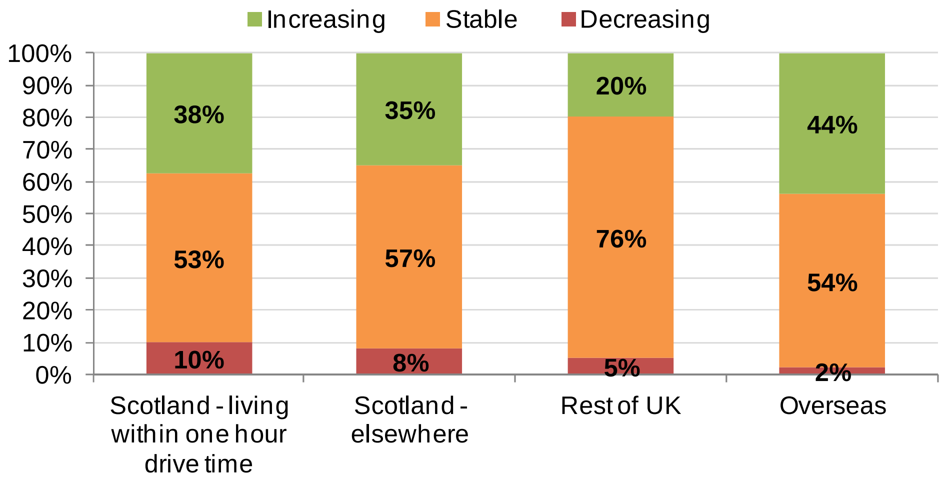
Business sector



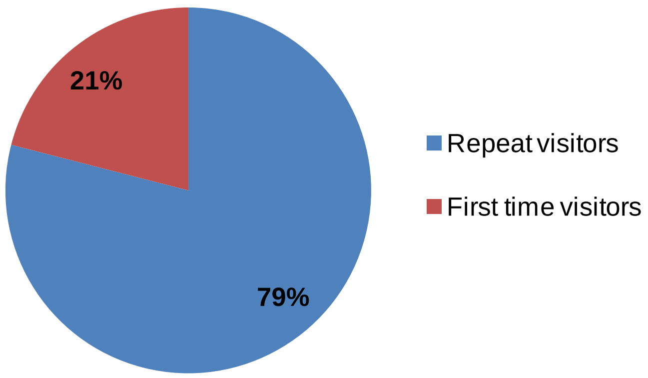
Customer origin mix



Customer origin trends



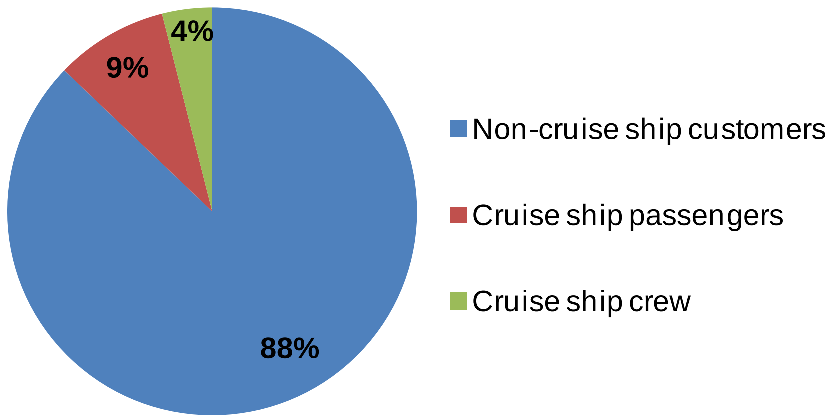
First and repeat visitors to Inverclyde mix



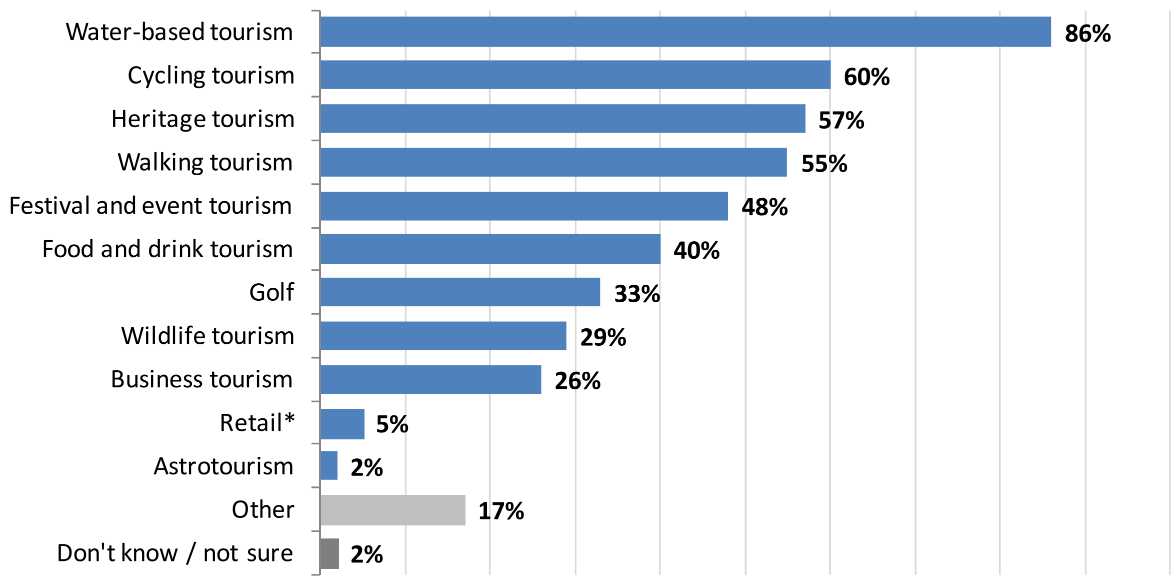
Cruise market

The importance of cruise ship visitors was gauged as businesses were asked to segment their customers into three groups: cruise ship passengers, cruise ship crew and non-cruise ship customers.

As apparent from below, the vast majority of business footfall was perceived to come from non-cruise ship customers. For businesses outside of Greenock, non-cruise ship customers accounted for an even larger share (circa 98%) of the overall customer base.



Which tourism opportunities do you think Inverclyde is well placed to capitalise on?



Conclusions (LJ Research)

The Inverclyde Tourism Barometer Survey captured a wealth of key insights from tourism businesses in Inverclyde. Whilst the number of completed surveys was low from a statistical point of view, an excellent response was achieved as over 60% of the database of key contacts provided by the Council participated in the research. Furthermore, the feedback from businesses in different areas of the region providing a broad range of tourism experiences ensures that a good spread of responses was achieved to enable more robust findings.

Taken as a whole the findings suggest improving conditions for Inverclyde tourism businesses: levels of business by-and-large increased this year compared to last year and most businesses observed an upward trend in local, domestic and international customers compared to previous years.

However, there was a tangible sense of frustration with regard to engagement with the cruise market. As highlighted in the below verbatim comments, there is a view that Inverclyde is missing opportunities to benefit more from cruise ship visitors.

"Not happy at all with the situation with cruise ships. Do a shuttle bus between Gourock and Greenock and let the passengers walk back and enjoy eating, drinking and shopping between Gourock and Greenock rather than just offering tours of the area and then leaving them in Greenock which is not a good example of the area."

"The continued exclusivity deals for Cruise passengers is damaging to both the local area and the continuation of cruise liner tourism."

Corroborating the comments above, the research has highlighted a fairly low penetration with this market as footfall from cruise ships accounted for c. 10% of the overall customer base. Despite the current frustrations, many businesses (24% of the sample) identified the cruise market as a significant opportunity. As one business put it:

"[The greatest opportunity for my business is] cruise ship passengers if there is a way to present a highly effective advance promotion strategy. The difficulty is getting to the passengers – we only get to them when they're getting off the cruise ship and making a beeline for coaches to Glasgow and Edinburgh. Signage throughout Greenock would be good to encourage tourism. Banners highlighting festivals... and other leisure pursuits, for example."

On the balance of the findings, we recommend efforts to generate more awareness of the Inverclyde tourism offer among cruise visitors. Whilst it seems unlikely that significant change can be made soon to affect the itinerary of cruise visitors to Inverclyde, promoting the tourism offering of the area will help to increase engagement among cruise visitors with time to spare; perhaps more crucially, it may educate cruise visitors about the potential of the area. Through 'word of mouth' this marketing may help to increase engagement with Inverclyde among future cruise visitors.

Businesses were keen to identify opportunities to grow tourism around developing more water-based activities and events. The proximity to Glasgow and relative ease of access by public transport to Inverclyde was highlighted alongside this opportunity which suggests that marine tourism initiatives should be targeted most to local audiences. A finding corroborated in the customer origin analysis which identified local visitors as the predominant customer segment.

However, in order to fully capitalise on water-based tourism opportunities there will be a requirement to tackle three key challenges and barriers to growth commonly cited by businesses: bureaucracy / legislation, a lack of financial support and staffing.

The role of the Council and its ability to assist tourism businesses was often a key consideration in light of these challenges. There was a view that improvements to the structure of the Council and, specifically, the tourism department is required to facilitate business growth. As expressed by one respondent, a destination management organisation (DMO) or overarching body for tourism development may be the answer.

"[My suggestions to grow tourism in Inverclyde are] more grant funding and a permanent DMO and tourism department within the council."

Irrespective of the structure for tourism development in Inverclyde in the future, many businesses cited the need for increased collaboration when asked if they had any final comments about growing tourism in Inverclyde.

This initial research along with additional activities to help shape the refresh of the Inverclyde Tourism Strategy will help to identify the best methods for collaboration between individual tourism businesses and other tourism stakeholders in Inverclyde. It seems critical that an effective approach to share information is developed alongside methods to address key business challenges in order for the maritime assets of Inverclyde to be fully deployed.

End

COIGACH CONSULTING

Inverclyde Regional Tourism Strategy 2016-2020

Building for the Future

March 2016

Contents

INVERCLYDE TOURISM STRATEGY 2016-2020

Strategic National Framework

The national tourism strategy puts the customer at the heart of the tourism experience. This means providing excellent experiences which exceed visitor expectations and offers visitors a uniquely joined up experience that will generate future growth.

Tourism in Inverclyde

Tourism is worth £60m (source STEAM) to the local economy and employs up to 1,000 people. The sector is a resilient and important contributor to the economic and social sustainability of the area. Tourism is one of Scotland's most enduring industries and is recognised by many as the most sustainable long term sector of the Scottish economy.

Much has changed since the previous 2009-2016 strategy was written. Developments across digital and social media continue to make the customer more discerning, smarter and more demanding by the day.

Inverclyde sits in an enviable position of being a maritime destination, rich in history and heritage and linked directly with Glasgow and the Clyde Estuary. The tourism and hospitality offering has several large operators and is well served by a range of smaller locally owned businesses. Inverclyde is ideally suited to maximise its location as an events base for local, regional and international water based activities.

The area is set to go through a major investment with the recently announced City Deal development plan with £30m planned to be invested in local infrastructure projects.

The area is further strengthened by its proximity to the main markets as recognised by local business. Such a position makes for the area being a prime day trip and event orientated destination.

There is however an ongoing challenge to attract water based activity providers and to pull together interest groups and businesses operators, no matter the size of business, to share in the ambition to provide the customer with the very best experience.

Public sector resources are restricted and there is a new approach towards destination development with local groups and the business communities taking the lead in setting the local agenda. Local businesses are leading the way in determining the future of the sector whilst aligning with a national strategic framework. Future success is dependent on a continued partnership approach between private and public sectors.

There remains a challenge in attracting and retaining a range of higher quality accommodation and food and beverage businesses. Such a gap in the local offering will hold back tourism development and restrict making the most from the visitor economy.

The strategy sets out to be bottom up, industry driven, aimed at bringing growth to businesses that chose to engage, share and contribute to a customer experience driven industry. Collaboration between groups, membership bodies, sector and event-based interest groups is essential for the area to realise its full potential.

The strategy is based upon a partnership approach between public and private sector stakeholders to jointly influence, guide change and grow the value, volume and resilience of the tourism sector.

The Strategy sets our key aims and ambitions that will in turn require annual detailed action plans to be prepared by the proposed Inverclyde Tourism Partnership Group.

Inverclyde has the very real potential to stake a claim as Scotland's leading maritime waterfront destination with a strong offering attracting the lucrative day visit family market. To do this however it must be recognised that the private sector cannot do it all on their own and strong partnership must remain in place between public and private stakeholders.

(STEAM: **Scottish Tourism Economic Activity Monitor)**

Vision, Mission, Delivery and Action

Vision

By 2020 Inverclyde will be recognised as a leading coastal and day visit destination of first class memorable customer experiences delivered by skilled and passionate hosts.

Mission

This strategy seeks to grow the value of tourism by £4m, the volume of visits, the likelihood to return to the area so increasing jobs and the economic contribution tourism makes to the Inverclyde area.

Delivery

The delivery of the strategy will be through three key themes of:

- Providing Memorable Experiences
- Improving the Customer Journey
- Building our Capabilities

Measurement and Targets

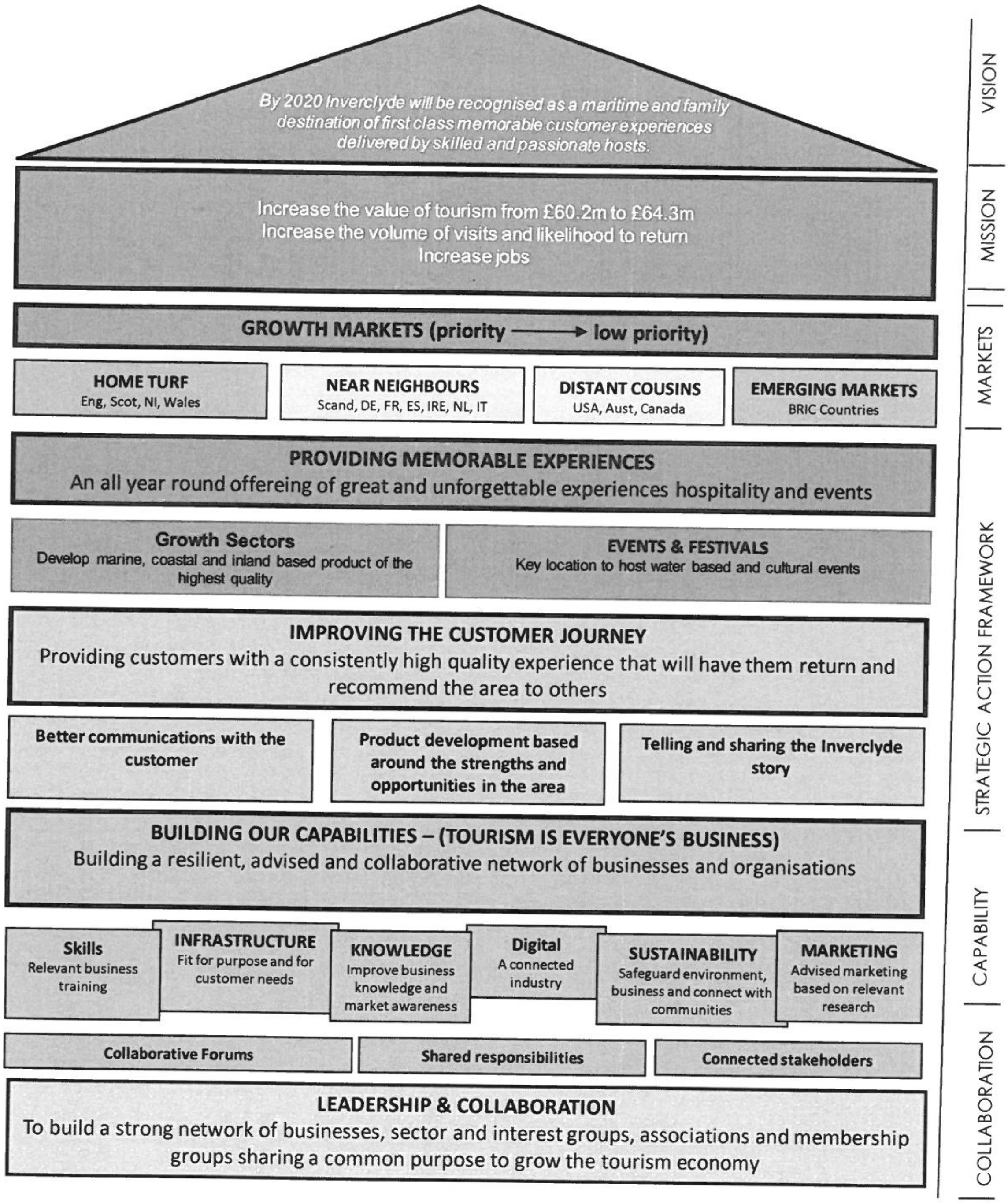
Measure	Source	2015	Growth	2020
Revenue £ (millions)	STEAM	£60.08	7%	£64.3
Visitor numbers (millions)	STEAM	.552	2%	0.563
Visitor days (millions)	STEAM	1.131	5%	1.187
No. of day visits per year	STEAM	2.03	3%	2.10
Spend per visitor day	STEAM	£53.12	2%	£54.15
Total employment (FTEs)	STEAM	984	4%	1023
Customer Feedback Score	Local	0	-	50%

- **Revenue –** growing the local economy
- **Visitor numbers –** building all year round visitations
- **Visitor days –** building time spent in the area
- **No. of day visits per year –** building likelihood to return
- **Spend per visitor day –** increasing quality and value for money
- **Total employment (FTEs) -** building the community
- **Customer Feedback Score –** providing memorable experiences to be recommended to others

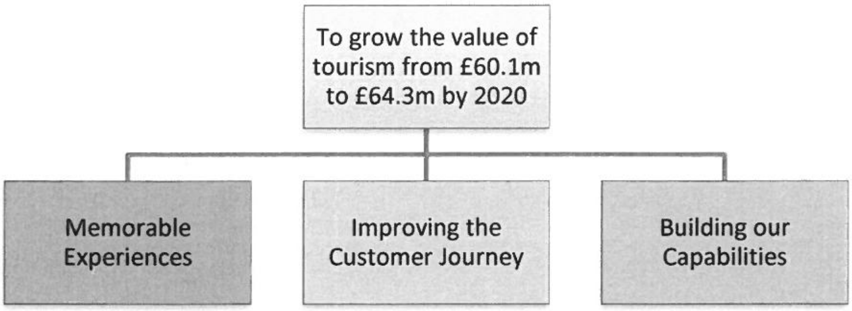
Action

This Strategy looks to set the overall aims for tourism growth across the Inverclyde area. Following the formal adoption of the Strategy, a detailed annual Action Plan will require to be developed. The Action Plan will set out detailed and measurable actions that will be required to achieve the above Vision, Aims and Targets.

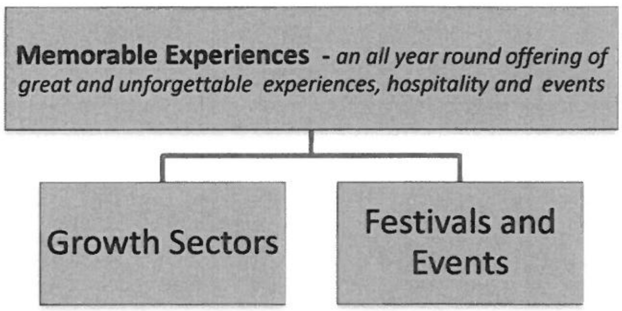
INVERCLYDE STRATEGIC CONTEXT



STRATEGY IN ACTION



1. Memorable Experiences - an all year round offering of great and unforgettable experiences, hospitality and events.



Inverclyde has a unique mix of marine, coastal and inland based tourism assets and is closely associated with one of the most iconic waterways in the world. The following sectors are seen as key to future growth and attracting visits from key markets; Glasgow, west, south and central Scotland.

1. **Growth Sectors –** Develop marine, coastal and inland based product of the highest quality.

    - Marine – develop tourism offering that is connected to the sea, The River Clyde and builds Inverclyde's position a key marine tourism area in Scotland.

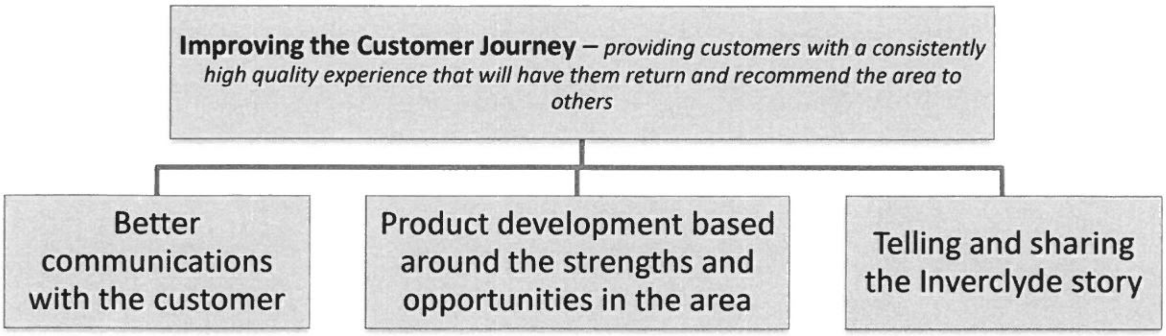
    - Waterfront – maximise access to and the potential of Inverclyde's waterfront as an attraction in itself, as Scotland's busiest cruise ship port and to host events and attract new operators associated with coastal and marine tourism.

    - Inland – fully maximise the potential of outdoor activities and recreation products associated with Inverclyde's rich and diverse countryside through product development and promotional inititaives.

- Arts, Culture and Heritage – increase visibility of coastal heritage trails, arts and the culture of the area.
- Food and Drink – develop an Inverclyde Food & Drink group challenged to develop a business network aiming to 'raise the bar' for the provision of local food and drink.

2. **Festivals & Events –** Position Inverclyde as a key location in Scotland to host water based events whilst continuing to develop the strengthening arts and cultural sectors.
    - Strengthen local partnerships to bid and attract new events and to promote and raise awareness of a developing year round series of events and festivals.
    - Develop sustainability capacities and resilience of locally led events.
    - Build better awareness across sectors of the programme of festivals and events to help boost visitor numbers and overnight stays.

2. Improving the Customer Journey – providing customers with a consistently high quality experience that will have them return and recommend the area to others



The ability to connect with the customer pre, during and post visit is essential to the success of the area. Built around local responsibility for the customer experience local business networks will drive up the quality and experiences. There will be more cross referring and cross selling of local and regional products and events so providing the customer with a real sense of place when touring or visiting the area.

1. Joined up communications with the customer- clear lines of communication offering the customer access to business and events

    - Aligning tourism messages across digital web, app and print channels.
    - Providing a shared digital information gateway to the area.
    - Information sharing supported through collaborative news network across the area.

2. Product development based around the assets, strengths and opportunities in the area.

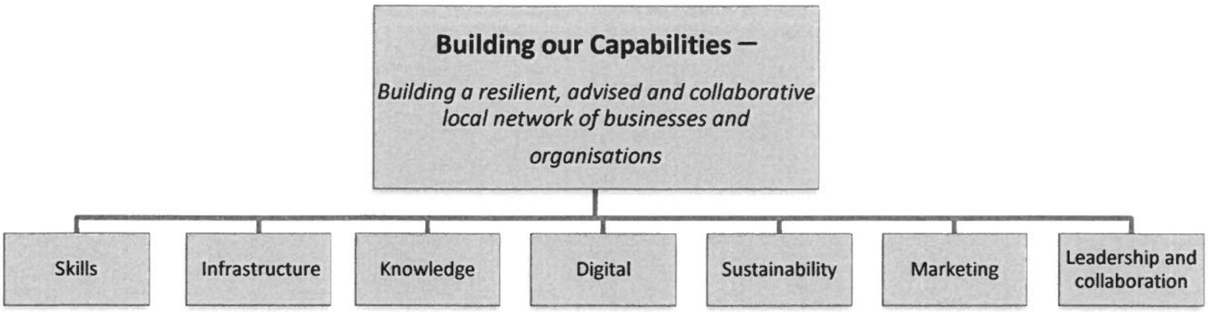
    The following areas are earmarked as priority sectors and align with national strategy. Within each, a clear action plan will be developed and targeted to develop the levels of quality and capabilities of operators.

    - Activities, Attractions, Marine and Nature
    - Events and Festivals
    - Arts, Heritage & Culture

- Accommodation, Food and Drink

3. Telling the Inverclyde story - connecting the visitor with the area and local businesses.

- Development of the Inverclyde story – an initiative that provides businesses with 'nuggets' and 'gems' about the area, what's on and what to do.
- Customer journey testing; local groups to self-assess their area and what can be done to improve the customer experience.
- Creation of a Business Communication Network, thereby sharing news and business updates through a circulation news bulletin.



3. Building our Capabilities – Building a resilient, advised and collaborative local network of businesses and organisations

The building bricks of the industry will be based around the ambition of developing a knowledgeable, advised, digitally skilled and networked range of businesses, interest groups and organisations.

- Skills- relevant business training.
    - Development of a specific and locally driven tourism customer service skills programme suited to local businesses, local product and customer needs. The programme will be developed to 'raise the bar' for entrants to the sector through to experienced and established businesses.
    - Further build the digital skills capacities of the sector through development and delivery of a series of digital skills courses covering IT, web, social media awareness for business.
    - Packaging – support development and wider availability of packaged tourism products through local businesses capable of selling such product.
- Infrastructure - fit for purpose and for customer needs.
    - Further develop town and village signage, gateway signage and trail signage.
    - Working with Abellio Scotrail to develop growth of train passenger visits and local partnership tourism products to boost arrivals.

- Knowledge – improve business knowledge and market awareness.
    - Customer research – undertake consumer research programme to advise and influence business decision making and marketing.
    - Customer feedback – a programme of capturing feedback from business, destination and events will be grouped and shared to measure customer satisfaction, likelihood to return and to recommend. Programme to provide Net Promoter Score data for local and national benchmarking.
    - An annual Business Barometer will gather local data for local businesses. This will be supplemented by national gathering processes (STEAM and VS).
    - Shared knowledge - mechanisms will be put in place to share and disseminate information, data, and statistics.
- Digital – a connected tourism industry maximising digital opportunities.
    - Building the digital agenda into all strands of work.
    - Maximise the potential of available digital development programmes such as Digital Scotland to benefit local businesses so enhancing business and event capabilities through structured support, advice and signposting to best practice and training support.
    - Best use of digital network platforms to aid and support business to business networking.
- Sustainability – to safeguard the environment, businesses and to connect with communities.
    - To develop inward investment tourism opportunities for the area.
    - To link with Zero Waste Scotland, Energy Saving Trust, Keep Scotland Beautiful.
- Marketing - advised marketing activities based on relevant research.
    - Guided by consumer research, targeted marketing to recognised key markets with prioritisation towards Scotland's Central Belt day visit market.

  - Fully engage with neighbouring product and destination marketing groups to maximise potential to extend marketing reach and develop joint initiatives and campaigns.
  - Recognition of the new VisitScotland segmentation will influence marketing activities.
  - Review and shared agreement reached regarding the core proposition that is presented as 'Inverclyde' to key markets.
- Leadership and Collaboration – to build a strong network of businesses, sector and interest groups, associations and membership groups, sharing a common purpose to grow the tourism economy.
  - Work in partnership with a local business led destination group and explore the potential of a collaborative business forum drawing together; businesses, organisations, communities, sectors, membership organisations. Such a forum (e.g. Visit Inverclyde Partnership) to lead and shape the delivery of the strategy.

RESOURCES – HOW TO MAKE IT HAPPEN

The delivery of the strategy will not happen without support, resource and commitment from both the private and public sectors. The ambitions within the strategy and their achievement will directly relate to the collaborative partnership and the resources it can lever in to make things happen.

The majority of the initiatives that will percolate through to the Strategy Action Plan will be dependent upon an investment of time and people contributing to delivery. There are however elements that will require discrete funding, these being staff resources at Inverclyde Council to support and at times lead on matters plus resources for the primary and secondary research that is called for within the strategy.

The subsequent Strategy Action Plan will determine the scope of such costs and commitment.

STRATEGY ACTION PLAN

Following on from the signing off and adoption of the strategy, detailed work will require to be undertaken to set out the delivery action plan, along with timetables, resources required, means of measurement and prioritisation.

The development of the Strategy Action Plan will involve further engagement with stakeholders prior to finalisation.

MEASUREMENT

To measure progress against targets and to build the capabilities of local businesses a robust approach to data collection, research and distribution of that research is required. To meet this requirement a mix of externally sourced data will be collected along with locally sourced information. The sources are anticipated as:

STEAM

The continuance of subscription to the STEAM data reports.

Visitor Attraction Monitor

The continuance of subscription to the Visitor Attraction Monitor.

Business Barometer

The Business Barometer was introduced in 2015 and provided local insight to tourism and business trends. The Barometer has the potential to gather high quality locally based data from the tourism sector. Data collected and interpreted can support strategic measurement and be circulated to businesses so supporting the ambition of a better advised industry.

It is recommended that the Business Barometer is carried out twice a year and is supported by a strong communications action plan so as to build take up and quality of final reports.

Customer Feedback

Central to the strategy of putting the customer at the heart of tourism there is the need to measure customer feedback and their experience in the area. The strategy sets targets of increasing the likelihood to return and recommend the area. To understand if this key target is being met a method of measurement is required. It is recommended that the net Promoter Score (NPS) is adopted at the core of this work. The NPS is the adopted approach within the National Strategy and so will allow for benchmarking with other areas of Scotland and nationally. The NPS will also allow local benchmarking to take place at a business level and aggregated sector level.

CONCLUSIONS AND RECOMMENDATIONS

The Inverclyde Tourism Strategy 2016-2020 seeks to put the customer at the heart of actions and ambitions and also seeks to maximise the natural assets of the area.

This is sumarised as follows: ***By 2020 Inverclyde will be recognised as a leading coastal and day visit destination of first class memorable customer experiences delivered by skilled and passionate hosts. The strategy seeks to grow the value of tourism, the volume of visits, likelihood to return to the area so increasing jobs and the economic contribution tourism makes to the Inverclyde area.***

The delivery of the strategy will be through three key themes of: ***Providing Memorable Experiences, Improving the Customer Journey, Building local Capabilities***

To realise the above a new approach to tourism development is being sought where private sector and public sector partnerships are strengthened in pursuing commercial opportunities that will grow the sector and make a greater contribution to the economic prosperity of Inverclyde. Tourism is arguably Scotland's most sustainable industry that has a strengthening place in Scotland's economy. Ongoing investment in the sector is required to realise this opportunity.

The area has the potential to be a leading day trip destination with an inextricable connection with the Clyde and maritime Scotland.

The Strategy identifies the sectors within Inverclyde that can offer growth and calls for continued investment around; marine, the waterfront, inland activities, arts, culture and the areas rich heritage. In addition development of local food and drink offering and the events and festivals sector is highlighted along with partnership work with Abellio Scotrail.

The ability to connect with the customer pre, during and post visit is essential to the success of the area. Built around local responsibility for the customer experience, local business networks will drive up the quality and experiences. There will be more cross referring and cross selling of local and regional products and events so providing the customer with a real sense of place when touring or visiting the area.

The building bricks of the industry will be based around the ambition of developing a knowledgeable, advised, digitally skilled and networked range of businesses, interest groups and organisations.

To measure progress against targets and to build the capabilities of local businesses a robust approach to data collection, research and distribution of that research is required. To meet this requirement a mix of externally sourced data will be collected along with locally sourced information, the latter being of critical importance.

Within the strategy there is a call for a collaborative approach and the formation of an 'Inverclyde Tourism Partnership'. With the pending winding up of the Local Area Tourism Partnership it is vital that a cohesive local body exists to bring private and public sector stakeholders together. Such an approach will challenge resources, however an industry that employs up to 1,000 FTEs and contributes over £60m to the local economy will provide a return on the investment likely to be required to form a realistic Action Plan and to give the Strategy a fighting chance.

It is essential that the leadership of an 'Inverclyde Tourism Partnership' is addressed both in terms of private and public sector stakeholders but also to have adequate support and resources to enable and deliver the key priorities within the Action Plan.

NEXT STEPS

Following on from the strategy being accepted by stakeholders the intention would be to explore the potential of the formation of an 'Inverclyde Tourism Partnership'.

The 'Inverclyde Tourism Partnership' will then move to lead and input to the formation of a business led Action Plan.

End.

INVERCLYDE TOURISM BUSINESS BAROMETER

Prepared for:

INVERCLYDE COUNCIL

Prepared in:

DECEMBER 2015

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LJ RESEARCH IS A COMPANY PARTNER OF THE MARKET RESEARCH SOCIETY

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INTRODUCTION

LJ Research was commissioned by Inverclyde Council, hereafter referred to as the Council, in August 2015 to undertake a survey of local tourism businesses.

The key objectives of the research were to evaluate business trends and to gauge perceptions, including the potential opportunities and challenges, of tourism in Inverclyde.

In addition to providing the Council with up to date information on local tourism business performance, the research provides key insights to help shape the new Inverclyde Tourism Strategy to be launched in early 2016.

This report summarises the key findings from the survey. A full set of detailed data tables can be provided under separate cover to accompany this report, if required.

METHODOLOGY AND SAMPLE

A dual-pronged methodological approach was applied to undertake the research. Firstly, tourism businesses were invited to take part in an online survey hosted in Visitrac – LJ Research's wholly owned and operated online survey system.

For this approach, using a list of 69 tourism business contacts provided by the Council, LJ Research contacted individual businesses by email. Within the email a hyperlink to the online questionnaire was included to enable the business contacts to provide feedback at their own convenience. This exercise was repeated twice among non-respondents to augment the overall response to the online survey.

The second wave to capture business feedback entailed telephone interviewing. Business contacts known not to have contributed to the online survey were contacted again and invited to take part in a short telephone interview of circa 15 minutes. To do this, LJ Research liaised with individual contacts to arrange a convenient time slot for the interview. In some cases, as is standard with this approach, some interviews were rearranged and in a few cases cancelled as the business contacts prioritised other aspects over the research.

As shown below, LJ Research undertook a total of 13 telephone interviews among the target sample of local tourism business representatives which, combined with the 29 online survey responses, resulted in an overall sample of 42 responses to the research.

Response Statistics

Methodology	Contacts invited to participate[1]	Number of survey responses	Response rate
Online	65	29	45%
Telephone interview	39	13	33%
Overall	**69**	**42**	**61%**

[1] Please note, some contacts were invited to take part in the online survey *and* a telephone interview, although only 1 response per business was required. The sum, therefore, of contacts invited to participate exceeds the underlying number of businesses in the database (N=69).

ANALYSIS

Cross-analysis of the results was undertaken to examine similarities and differences in the opinions among different groups of businesses in Inverclyde. These groups are outlined below. However, it should be noted that due to the small sample size achieved in the research (despite the high response rate of 61%), this analysis is subject to large margins of error. Therefore, the findings deduced from this analysis and described in subsequent sections of this report should be considered as indicative only.

Analysis Aspects

Aspect	Group	Sample Size
Business Location	Greenock (PA15 or PA16 postcode)	N = 23
	Inverkip and Gourock (PA16 or PA19 postcode)	N = 14

Business Sector	Accommodation	N = 7
	Activity operator	N = 5
	Attraction / museum / art venue	N = 11
	Food / beverage / retail	N = 14

Summary of Key Findings

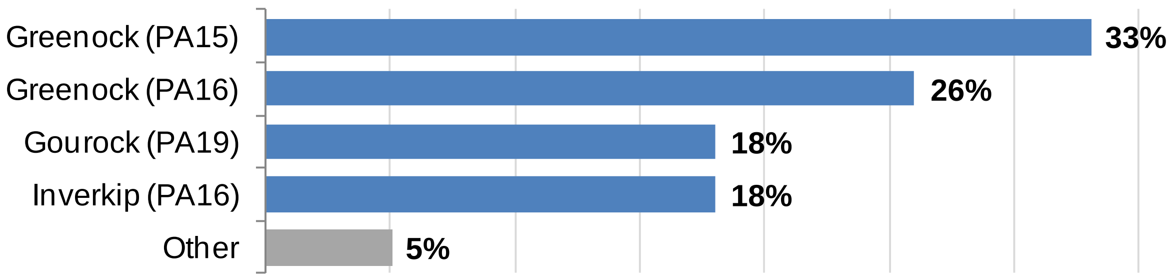
This section outlines the key findings of the research and analysis. Detailed cross-analysis data tables containing results to all questions can be provided separately, if required.

Profile of respondents

Business location

The majority of responses were from businesses based in and around Greenock (postcode districts PA15 and PA16). A handful of businesses from the Gourock and Inverkip areas of Inverclyde also responded to the survey.

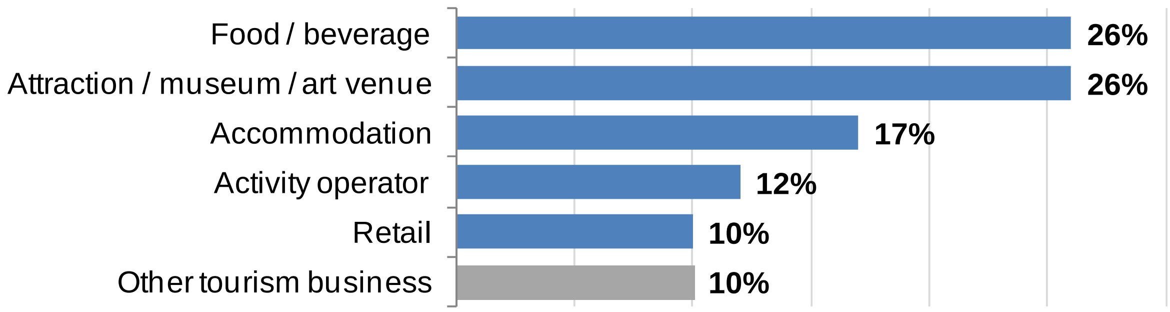
Business location



Business sector

A good spread of business types contributed their views to the research. As can be seen below, catering businesses along with attractions / museums / art venues accounted for over half of the responses.

Business sector

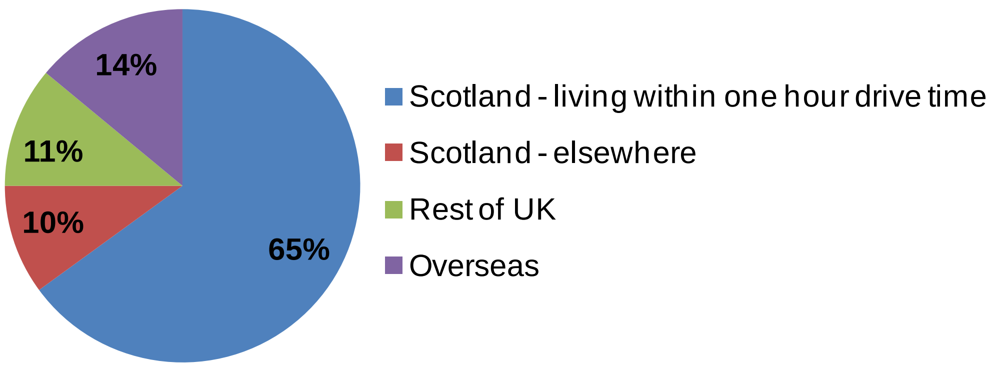


Customer profile

Origin

Businesses were asked to describe their mix of customers by origin. Accounting for around two-thirds of the overall customer base, those living within a one-hour drive time were identified as the key customer origin segment.

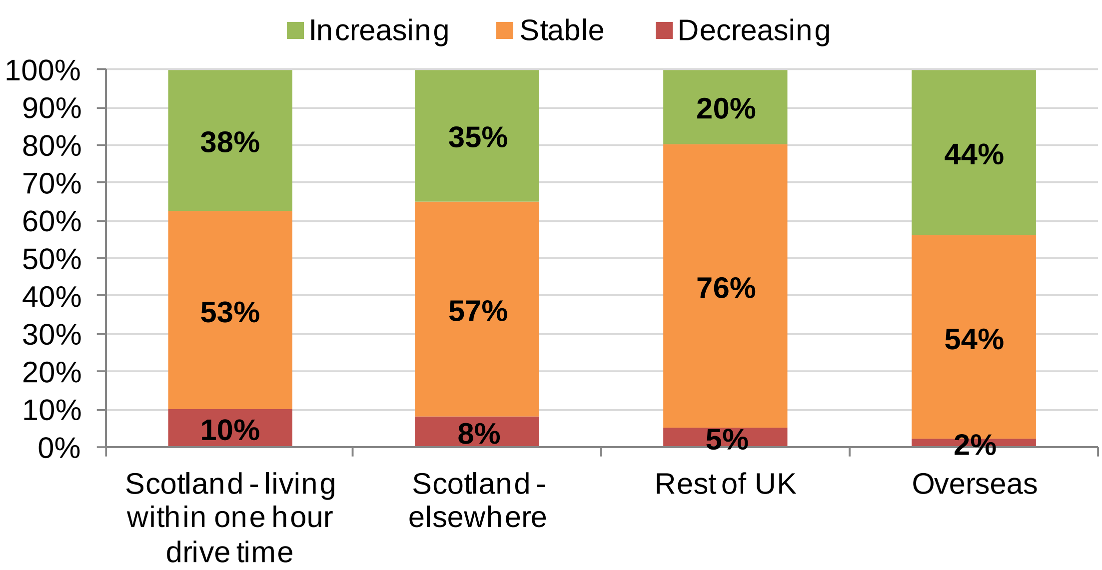
Customer origin mix



There was evidence of growth among each of the four segments when businesses were asked about customer origin trends over the last few years. The steepest increase observed was for overseas customers: 44% (or 18 out of 41) businesses cited increasing volumes of overseas customers over the last few years.

Meanwhile, the slowest rate of growth was apparent among those from the rest of the UK. As can be seen below, most businesses perceived the number of customers from this area to be relatively stable over the last few years and just 20% (or 8 businesses out of 41) noted an upward trend in this market.

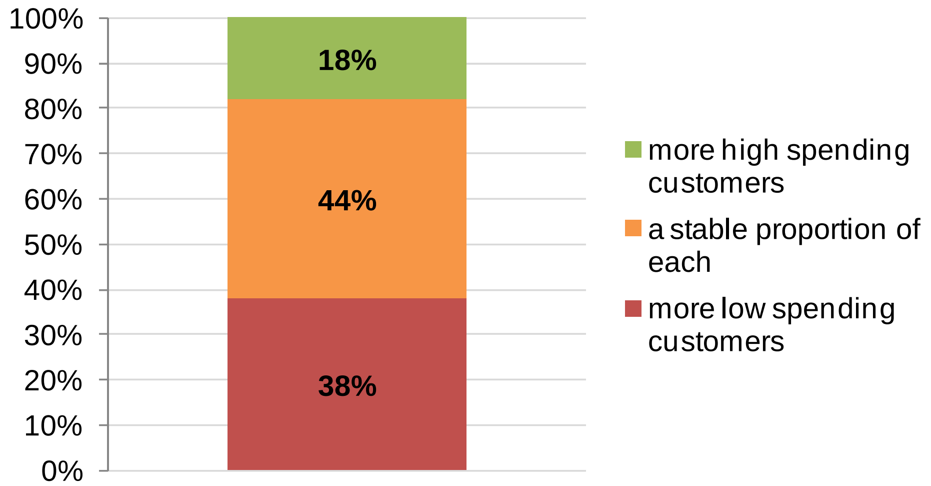
Customer origin trends



Spending habit trends

To gauge consumer spending habits in Inverclyde, businesses were asked to consider the extent to which their customer base had changed over the last few years in terms of their mix of high and low spending customers.

Spending habit trends

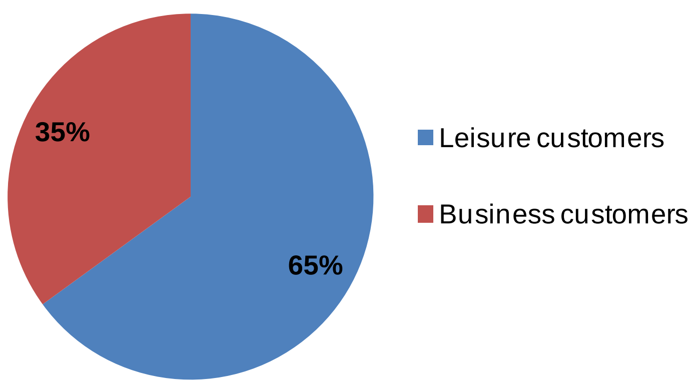


A trend of falling transaction values was evident as businesses observed a net increase in low spending customers (or, put differently, a net decrease in high spending customers). Attractions / art venues / museums and catering businesses noted a trend of disproportionately more low spending customers which suggests a more challenging trend among these businesses.

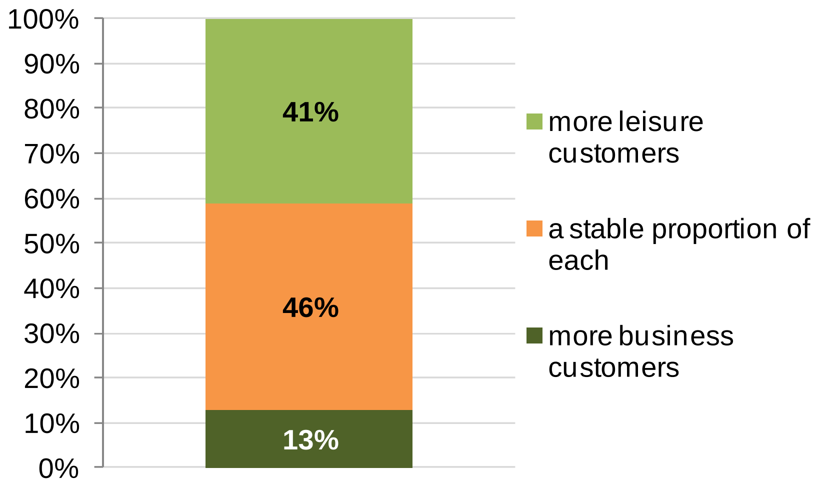
Business and leisure customers

Respondents indicated that 65% of their customers are in the area for leisure purposes and 35% are in the area for business / working purposes. There was evidence of a higher business visitor segment in the Greenock area as business visitors accounted for 43% of the customer base among these businesses.

Business and leisure customers mix



Business and leisure customer trends



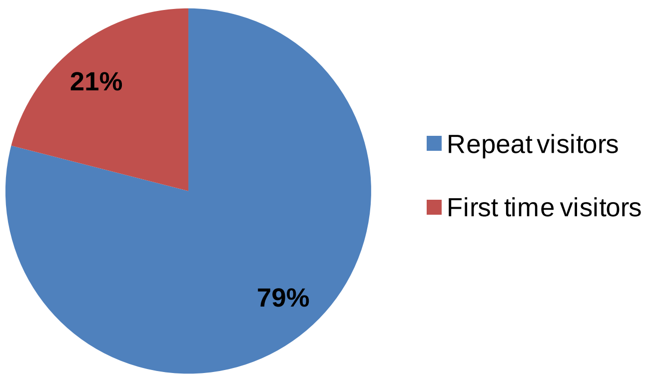
The core market of leisure customers was perceived to be growing: 41% (or 16 out of 39) stated that their business was attracting proportionately more leisure customers compared to previous years.

There are contrasting implications of the above result: a growth in the leisure segment – a segment which accounts for most of the customer base – implies that businesses targeting their services to these customers have benefitted in recent years. However, a shrinking business market, as is also implied by the above result, is likely to have negatively affected businesses due to the impact of less diversification.

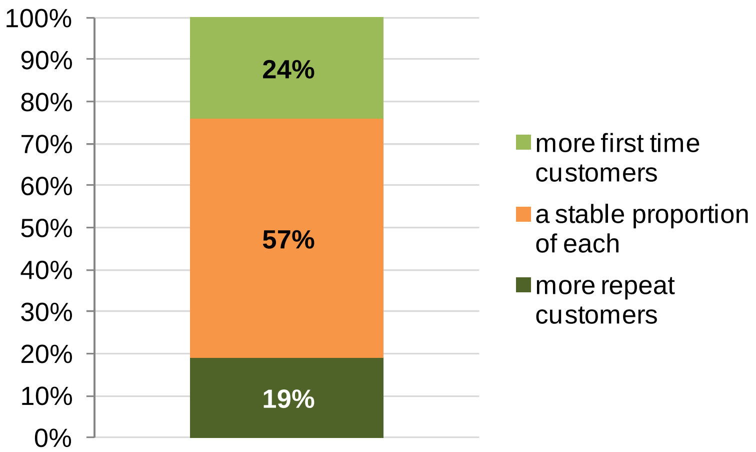
First and repeat visitors to Inverclyde

Businesses were also asked to evaluate the proportion of their customer base that was visiting Inverclyde for the first time. As shown below and in line with earlier analysis that suggested a reliance on customers from local areas, this segment was considered relatively small at around 20%.

First and repeat visitors to Inverclyde mix



First and repeat visitors to Inverclyde trends



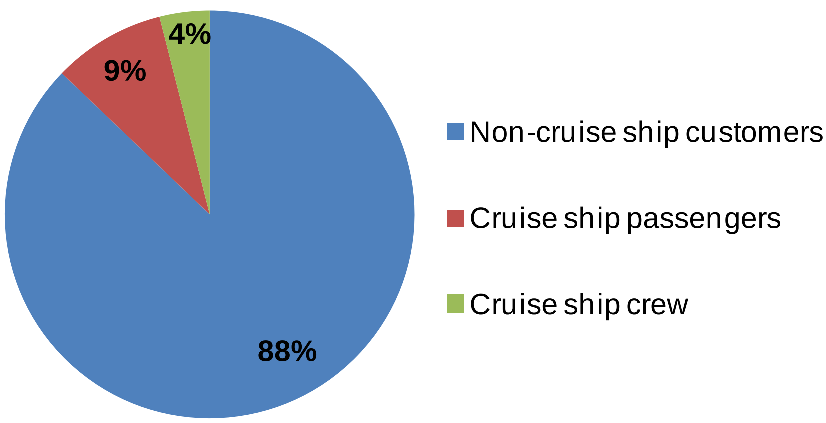
In contrast to the customer origin analysis, the mix of first and repeat visitors to Inverclyde compared to previous years was perceived to be quite stable.

Cruise market

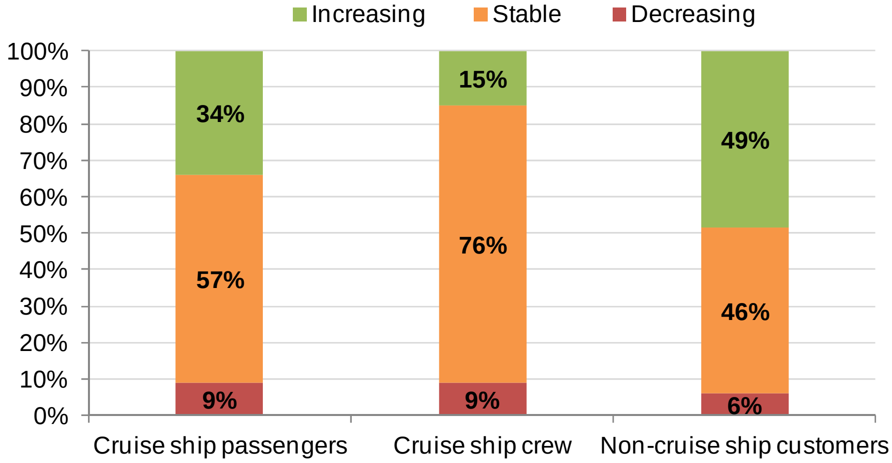
The importance of cruise ship visitors was gauged as businesses were asked to segment their customers into three groups: cruise ship passengers, cruise ship crew and non-cruise ship customers.

As apparent from below, the vast majority of business footfall was perceived to come from non-cruise ship customers. For businesses outside of Greenock, non-cruise ship customers accounted for an even larger share (circa 98%) of the overall customer base.

Cruise market mix



Cruise market trends



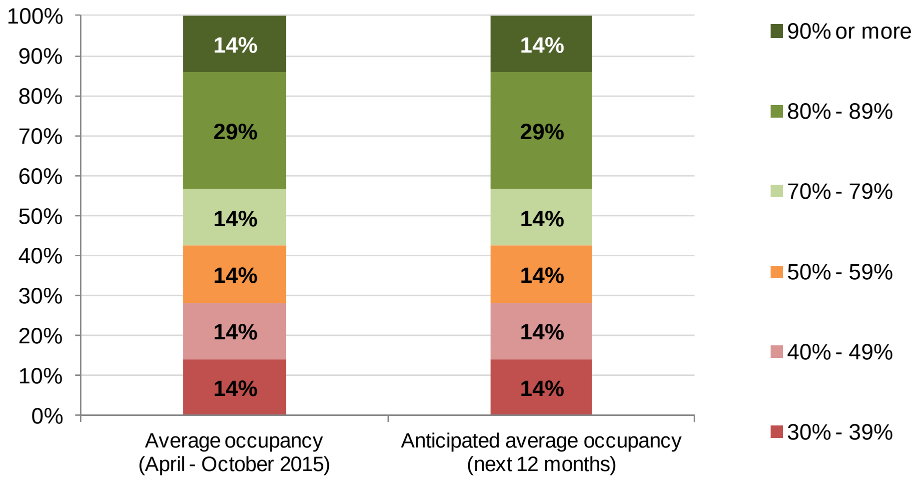
Consistent with customer origin trends, the cruise and non-cruise markets were both thought to have grown over the last few years. The fastest rate of increase was apparent for non-cruise ship customers as 49% (or 17 out of 35 businesses) noted an upward trend in this segment whilst only 6% (or 2 businesses) noted a decrease.

Occupancy

Among the small sample of seven accommodation providers that participated in the survey, average occupancy for the season – April to October, inclusive – was 68%.[2]

The breakdown of achieved and anticipated occupancy is shown below.

Occupancy – achieved and anticipated



[2] Average occupancy calculated crudely by a weighted average calculation of individual occupancy bands (e.g. 50% - 59% assumes 55% occupancy etc.). Please note again, however, that due to the very low sample size there is a high margin of error associated with this crude average.

Business levels

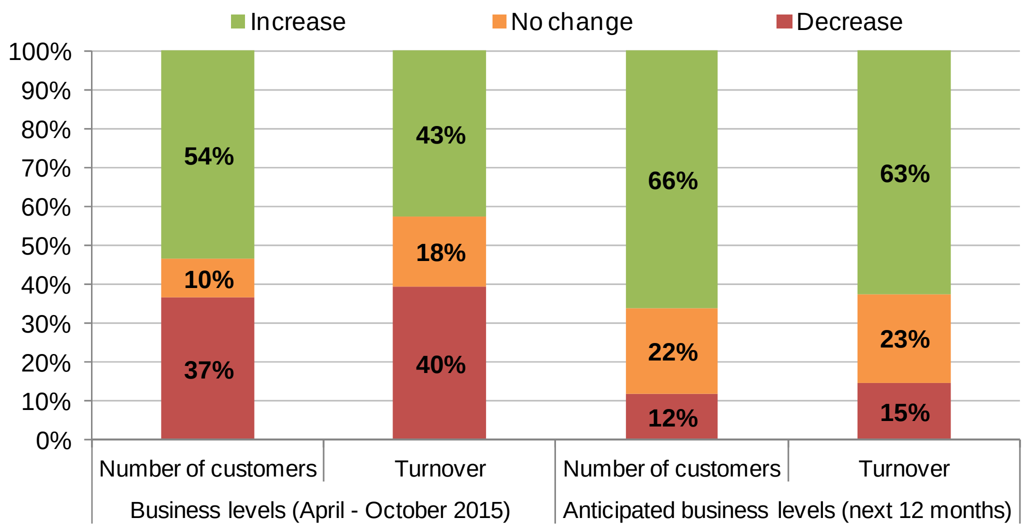
Businesses were asked to evaluate the rate of change of their achieved and anticipated levels of business.

Comparing this season with last season (April to October, inclusive), businesses cited an overall increase in customer numbers and, to a much lesser extent, turnover.

Although more businesses indicated an increase – rather than a decrease – in turnover compared to last year, there is evidence to suggest that overall turnover actually fell as more businesses noted significant (i.e. '11% or more') decreases in turnover compared to significant increases which negatively impacted the overall change in turnover.

Opposing trends in achieved levels of business were apparent in different areas of Inverclyde: Greenock businesses were more likely to note a decrease in business levels (i.e. both customer numbers and turnover) compared to those in Gourock and Inverkip.

<u>Business levels – achieved and anticipated</u>



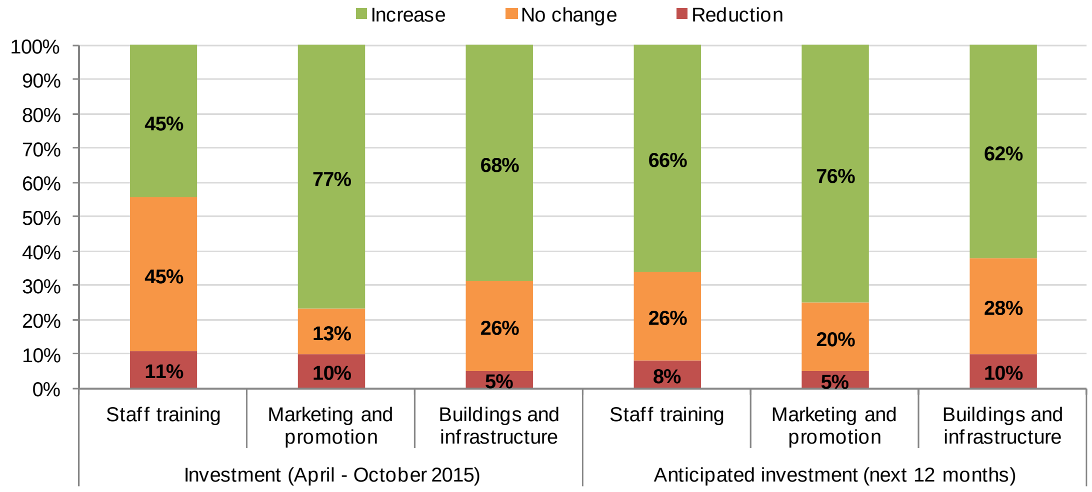
As shown above, most businesses expect to grow their current levels of business in the next 12 months with customer number growth again expected to outstrip turnover growth.

Investment

Levels of business investment were considered to be above those of a year ago (April to October 2015 versus April to October 2014) as businesses indicated overall increases in staff training, marketing and infrastructure expenditure.

As can be seen below, marketing activity saw the steepest increase: 77% of the sample indicated that they increased marketing and promotion investments whilst only 10% stated reductions in this category. However, there is a sense that this trend was less pronounced in Inverkip and Gourock as businesses here demonstrated a much lower uptake in marketing this year compared to last year.

Investment – undertaken and anticipated



A similar rate of investment to that undertaken between April and October 2015 was anticipated for the next 12 months. An exception to this, however, was staff training as businesses expected to accelerate their level of investment in this aspect going forward.

Comparing the overall rate of change of investment undertaken this year and anticipated in the next 12 months, there is an indication that accommodation providers are less likely than other types of business to develop their business through increased investment in these three key aspects.

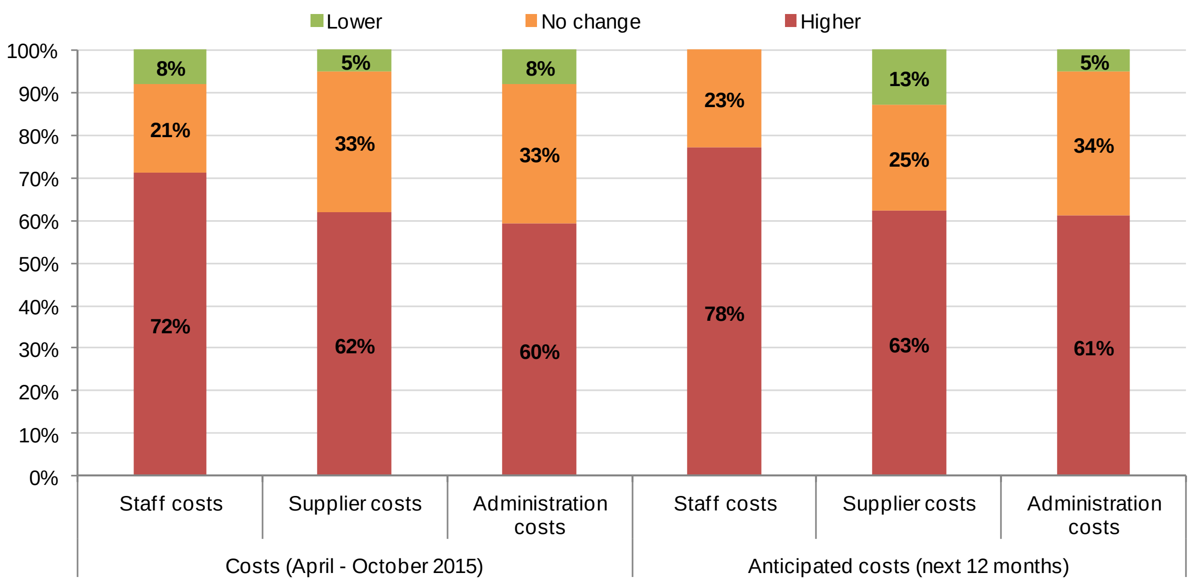
Costs

The overall cost base for businesses this year – April to October 2015, inclusive – compared to last year – April to October 2014, inclusive – increased as businesses noted higher staff, supplier and administration costs.

As shown below, the steepest increase in costs incurred was for staff costs: 72% of businesses attributed higher staff costs this year compared to last year while only 8% noted lower staff costs.

Going forward for the next 12 months, a continuation of the current trend was predicted as businesses expected costs to increase at similar rates to those incurred over the last 12 months. Staff costs were again identified as an issue as businesses anticipated these costs to increase faster than supplier and administration costs in the next 12 months. The 'national living wage' to be introduced in April 2016 is likely, at least in part, to have influenced perceptions of future staff costs.

Costs – incurred and anticipated



There was evidence to suggest comparatively greater cost pressures for businesses based outside of Greenock as those in Gourock and Inverkip noted above average increases in incurred and anticipated costs.

Meanwhile, attractions / art venues and museums attributed lower net changes in these aspects which suggests that they are more immune or perhaps more flexible to adapt to increasing staff, supplier and administration costs compared to other tourism businesses.

Business threats

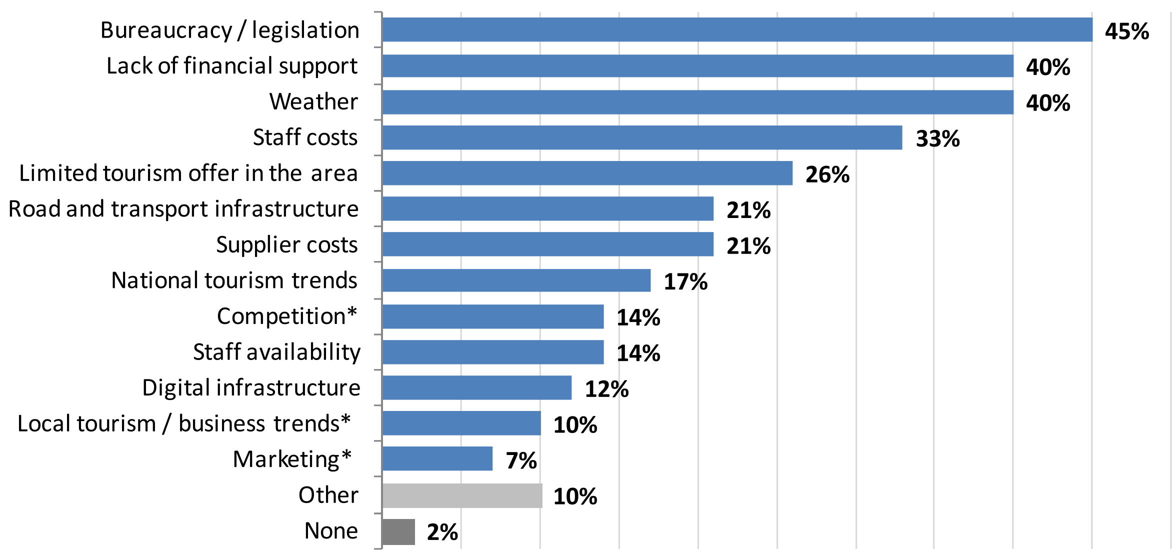
Businesses were asked to identify business threats or, expressed differently, potential barriers to growth. It is worth noting that the approach to gain insight on this topic varied by methodology. In the online survey businesses were presented with a list of 10 options plus an 'Other (please specify)' option. Meanwhile, in the telephone interview businesses were simply asked to state any threats and challenges associated with growing their business. As a result the mix of responses varied significantly between methodologies.

Combining the online and telephone interview responses, as illustrated below, the three greatest threats were: bureaucracy / legislation (45%), weather and lack of financial support (both 40%).

Whilst a lack of financial support was mentioned fairly regularly in the telephone interviews (by 4 out of 13 business representatives), bureaucracy / legislation and weather were cited much less regularly in this unprompted approach. The entrance of new competing businesses (mentioned by 6 businesses) and local tourism / business trends (mentioned by 4 businesses) were considered to be two other key threats to business growth among telephone interview respondents.

Businesses in Inverkip and Gourock were generally more likely than those in Greenock to state potential barriers to growth. Looking specifically at staffing issues, however, the opposite was apparent as Greenock businesses indicated more challenges associated with staff costs and availability.

<u>What, if anything, do you currently see as the greatest threat(s) to your business?</u>



The 17 businesses that indicated a lack of financial support was a threat to their business were asked to specify in an open format what type(s) of financial support would be most beneficial. As shown below, the key area of support was grant support mentioned by 12 of the 17 businesses.

Grant support **(71% / 12 out of 17 responses)**	*"We are looking to recruit new staff within one of businesses but the withdrawal of Graduate-level grant support has prevented us from doing this."* *"Grant support for advertising and marketing over a 3 year period. £2000 per year price matched to our own contribution. New initiatives of financial support - 90% grants for tourist websites in particular [targetted to] cruise liner passengers, family and staff/crew. Grants for buildings and property improvements, upgrading rooms and facilities, such as, reception areas and Wi-Fi services."*
Tax / business rates relief **(18% / 3 out of 17 respondents)**	*"Business rates are a challenge and there is a lack of support from the Council. We have an appeal with the Council that has been with them for 6 months."*
Specific business financial / funding issue **(12% / 2 out of 17 respondents)**	*"We have cash flow issues which is detrimental to our working capital. This happens thanks to being so popular this year but having to pay our suppliers upfront, we may only get the funds between 30 and 60 days after travel. This is particularly the case with cruise ship excursion companies. Having a grant or low interest loan would assist..."*

Tourism / business opportunities

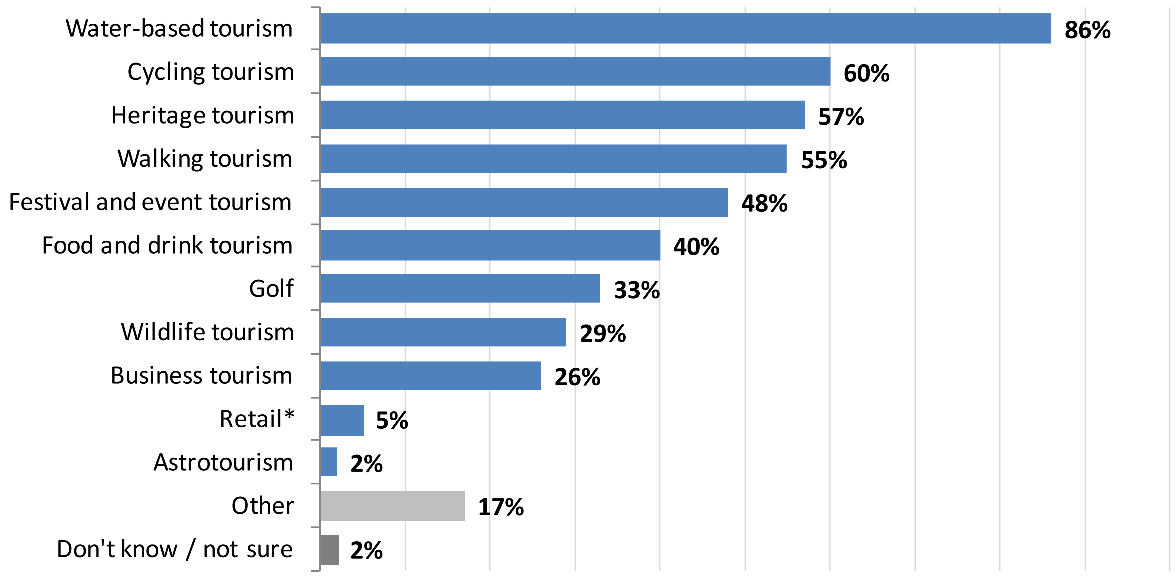
In a similar format to the previous question, businesses were asked to identify potential opportunities or avenues for Inverclyde to grow tourism.

Again, the approach to collect the information varied between the methodologies with an open, unprompted approach used in the telephone interviews and defined options presented in the online survey. As a result there were, again, notable differences between the two samples.

Water-based tourism was considered to be the key opportunity or 'driver' for additional tourism among the overall sample: 86% of respondents cited this aspect and there were similar incidences of this response in both the online and telephone interview sample.

The three next most common 'drivers' were cycling tourism (60%), heritage tourism (57%) and walking tourism (55%) with emphasis on the latter aspect – walking tourism – particularly pronounced among Gourock and Inverkip businesses.

<u>Which tourism opportunities do you think Inverclyde is well placed to capitalise on?</u>



Specific ideas for growing water-based tourism were probed among the 36 respondents who indicated opportunities in this area. As shown below, the three key themes which emerged were additional water-based activities, water-based events and boat trip services.

Other water-based activities **(27% / 8 out of 30 responses)**	*"It seems clear we do not make the most of the river as an asset. For instance, where can kids / families / schools hire canoes / dinghies / jet skis? Compare Inverclyde with the facility on Cumbrae."* *"More offerings in activities such as sailing, dinghies, paddle boarding, canoeing, wind surfing and jet ski-ing. These could all be carried out at The Greenock Cut Centre at Loch Tom."*

Water-based events **(27% / 8 out of 30 respondents)**	*"F1 power boats, sailing events, we have a huge expanse of water off the esplanade which should be used for more water activities."* *"More annual boat shows / events in and around Inverkip Marina (e.g. Tall Ships)."*
Boat trip services **(23% / 7 out of 30 respondents)**	*"Day trips to key points of interest in the Clyde e.g. Carrick Castle / Kyles of Bute."* *"Use local yacht clubs for taking visitors either leisure sailing / touring or even introduction to sailing."*

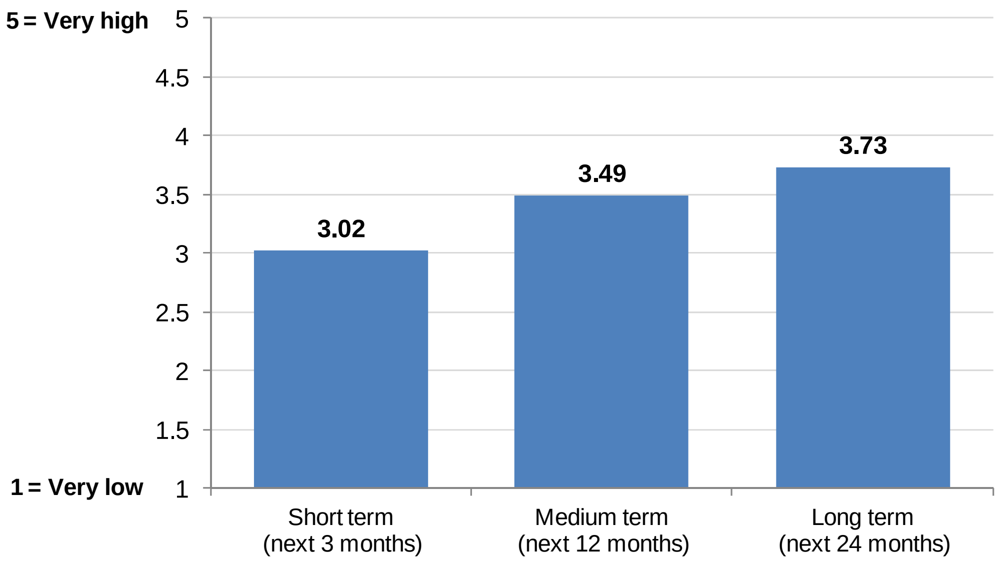
Business confidence

At the end of the survey businesses were asked to rate their overall level of business confidence for the short term (next 3 months), medium term (next 12 months) and long term (next 2 years).

As to be expected reflecting the timing of the research in Q4 2015, businesses attributed higher levels of confidence for the medium and long term compared to the short term.

As shown below, business confidence for the short, medium and long term was 3.02, 3.49 and 3.73 out of 5, respectively. Whilst each of the metrics was rated above the mid point – 3.00 which suggests neither confidence nor pessimism – being below 4 out of 5 highlights a degree of uncertainty about the future and, in particular, the next 12 months among local tourism businesses. This may be a reflection of doubts about next season along with uncertainty associated with external aspects like next year's Scottish Parliament election, the introduction of the 'national living wage' and other factors.

Business confidence – short, medium and long term



CONCLUSIONS

The Inverclyde Tourism Barometer Survey captured a wealth of key insights from tourism businesses in Inverclyde. Whilst the number of completed surveys was low from a statistical point of view, an excellent response was achieved as over 60% of the database of key contacts provided by the Council participated in the research. Furthermore, the feedback from businesses in different areas of the region providing a broad range of tourism experiences ensures that a good spread of responses was achieved to enable more robust findings.

Taken as a whole the findings suggest improving conditions for Inverclyde tourism businesses: levels of business by-and-large increased this year compared to last year and most businesses observed an upward trend in local, domestic and international customers compared to previous years.

However, there was a tangible sense of frustration with regard to engagement with the cruise market. As highlighted in the below verbatim comments, there is a view that Inverclyde is missing opportunities to benefit more from cruise ship visitors.

"The continued exclusivity deals for Cruise passengers is damaging to both the local area and the continuation of cruise liner tourism."

Corroborating the comments above, the research has highlighted a fairly low penetration with this market as footfall from cruise ships accounted for c. 10% of the overall customer base. Despite the current frustrations, many businesses (24% of the sample) identified the cruise market as a significant opportunity. As one business put it:

"[The greatest opportunity for my business is] cruise ship passengers if there is a way to present a highly effective advance promotion strategy. The difficulty is getting to the passengers – we only get to them when they're getting off the cruise ship and making a beeline for coaches to Glasgow and Edinburgh. Signage throughout Greenock would be good to encourage tourism. Banners highlighting festivals... and other leisure pursuits, for example."

On the balance of the findings, we recommend efforts to generate more awareness of the Inverclyde tourism offer among cruise visitors. Whilst it seems unlikely that significant change can be made soon to affect the itinerary of cruise visitors to Inverclyde, promoting the tourism offering of the area will help to increase engagement among cruise visitors with time to spare; perhaps more crucially, it may educate cruise visitors about the potential of the area. Through 'word of mouth' this marketing may help to increase engagement with Inverclyde among future cruise visitors.

Businesses were keen to identify opportunities to grow tourism around developing more water-based activities and events. The proximity to Glasgow and relative ease of access by public transport to Inverclyde was highlighted alongside this opportunity which suggests that marine tourism initiatives should be targeted most to local audiences. A finding corroborated in the customer origin analysis which identified local visitors as the predominant customer segment.

However, in order to fully capitalise on water-based tourism opportunities there will be a requirement to tackle three key challenges and barriers to growth commonly cited by businesses: bureaucracy / legislation, a lack of financial support and staffing.

The role of the Council and its ability to assist tourism businesses was often a key consideration in light of these challenges. There was a view that improvements to the structure of the Council and, specifically, the tourism department is required to facilitate business growth. As expressed by one respondent, a destination management organisation (DMO) or overarching body for tourism development may be the answer.

"[My suggestions to grow tourism in Inverclyde are] more grant funding and a permanent DMO and tourism department within the council."

Irrespective of the structure for tourism development in Inverclyde in the future, many businesses cited the need for increased collaboration when asked if they had any final comments about growing tourism in Inverclyde.

This initial research along with additional activities to help shape the refresh of the Inverclyde Tourism Strategy will help to identify the best methods for collaboration between individual tourism businesses and other tourism stakeholders in Inverclyde. It seems critical that an effective approach to share information is developed alongside methods to address key business challenges in order for the maritime assets of Inverclyde to be fully deployed.