



2012/17

TOURISM STRATEGY





On 14th February, 2011, the Ayrshire Economic Partnership (AEP) made a commitment to work together to strengthen and develop the tourism sector in Ayrshire & Arran by supporting business growth, creating jobs and improving our communities.

This **Ayrshire & Arran Tourism Strategy 2012-17** is the first tangible step in fulfilling that commitment – a strategy that has been developed and shaped through extensive engagement from all stakeholders. The strategy recognises the great strengths and assets that we have, setting out a clear vision and ambitious objectives.

The AEP members, and the organisations they represent, are fully committed to supporting the sector in implementing the strategy. Success will require businesses, the voluntary sector, communities, as well as the public sector to all make significant contributions, sustained over the five years.

Whether you are actively involved within the sector already, or have a more general interest in seeing the region prosper, we would encourage you to get engaged and get involved.

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AYRSHIRE & ARRAN

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Tourism is very important to the economy of Ayrshire and Arran, generating £348 million of revenue per year, from some 3.5 million visitors. This directly supports almost 9,000 jobs.

The region has tremendous assets and strengths that offer the visitor a range of great experiences, spanning rural, coastal, historic and built environments; world class golf, sailing, culture and heritage; high quality food, drink and hospitality; beautiful islands, marine and countryside.

We know that much more can be made of our assets and strengths. We are very ambitious for the sector and intend to significantly raise the performance of tourism over the next five years. We are confident the region's inherent potential can be realised with the right strategic framework and the collective capabilities and enthusiasm of the sector as a whole.

Our vision is:

Ayrshire and Arran will be a premier destination of choice, where visitors will receive a fantastic welcome and enjoy outstanding experiences of our coastline, countryside, culture and hospitality.

Our objectives in this strategy are to:

- Increase the annual number of visitors to Ayrshire & Arran by 10% to 3.85 million.
- Increase annual spend by visitors by 20% to £418 million.
- Grow the employment supported by the tourism sector by 10% to 9,800 jobs.
- Enhance and conserve the region's natural, heritage and cultural assets.
- The strategy will be based on a clear understanding of our key target markets and visitor needs.

We will focus on these markets by:

- Targeting the domestic market with integrated packages of activities and experiences that meet consumer aspirations.
- Providing added value – improving the visitor experience with exceptional customer service and strong product knowledge.
- Developing and promoting unique experiences that highlight the area's assets to targeted customer segments.

- Using traditional and new media to connect with customers on an ongoing basis.
- Extending the visitor season using events and pricing/ packaging of activities and experiences.
- Offering authentic food and drink experiences that add value to visitor experiences.
- Improving quality in all we provide and using credible Quality Assurance as widely as possible.

To achieve our vision and objectives, we will use the following elements:

LEADERSHIP

We will establish a Leadership Group, who will champion the strategy and inspire all stakeholders. This will deliver strong, effective leadership at all levels across the industry and encourage collaboration in developing our offers and the delivery of the highest levels of service excellence.

MARKETING

We will market Ayrshire & Arran as a single destination and align with VisitScotland's promotions. This one brand approach will identify the region as a distinctive destination, and will be supported by consistent communication of the main strengths of our visitor offer. It will be used by all industry stakeholders in promotional activities.

INFORMATION AND VISITOR SERVICES

We will provide information that is easy to understand, consistent and accurate. We will ensure it is accessible in a variety of ways including through Visitor Information Centres as well as online presence and booking capabilities.

We will also develop familiarisation activities and sales skills to enable an increased level of cross-selling and up-selling that will enhance the visitor experience and maximise their time in our area. We will encourage investment in technology and use of innovative approaches to ensure information and promotional offers are available in the ways our visitors prefer.

OFFERS

We will focus on eight distinct areas of offer where we know Ayrshire & Arran has particular strengths – Culture and Heritage, Activities and Natural Environment, Golf, Sailing, Food and Drink, islands, Weddings and Civil Partnerships, and Business Tourism.

The approach to each will differ, depending on the characteristics and potential for increased yield. There will be a focus on further product development and packaging with collaboration and networking playing a vital part. Significant events and festivals will be developed to attract visitors and extend the season.

THE BASICS

We will get the basic elements of the visitor experience right and link with our key offers in the development of packages. Quality and service excellence will be at the heart of this.

EFFECTIVE PARTNERSHIP WORKING

We will encourage all stakeholders to get directly involved in making this strategy work: businesses, the voluntary sector, communities and public sector.

The immediate tasks ahead are to establish the structures that will support the implementation of the strategy – the Leadership Group and a single Tourism Development team. The industry will develop a two-year action plan, after which a strategy review will take place. A performance management process will also be put in place.

Without doubt, the single most critical success factor for the strategy is the ownership and commitment of all stakeholders to engage, contribute and sustain their efforts over the full five year period of the strategy.

Working together for tourism, we can realise our ambitions for economic growth to the benefit of all.

Tourism is important to the economy of Ayrshire and Arran, generating around £348 million of revenue per year, and there is potential to grow this further through a co-ordinated regional approach. Ayrshire and Arran offers a wide range of great experiences, spanning rural, coastal, historic and built environments; world class golf, sailing, culture and heritage; high quality food, drink and hospitality; beautiful islands, marine and countryside. The region is highly accessible, with three international airports within 75 minutes drive-time, as well as excellent road, rail and sea connections. The challenge is to build on these assets to grow businesses, create jobs and improve our communities.

AYRSHIRE ECONOMIC PARTNERSHIP

The Ayrshire Economic Partnership (AEP) comprises representation from the business community and public sector agencies involved in economic development in Ayrshire and Arran. Members include the three Ayrshire Councils, Scottish Enterprise, Ayrshire Chamber of Commerce & Industry and three representatives from the business community.

The objective of the AEP is to focus on the most important economic development issues, taking action to generate clearly identified outputs that will have a positive and lasting economic benefit on the region. The AEP has identified tourism as an industry sector with significant potential for development and agreed to pursue a pan-Ayrshire approach to growing the contribution of the sector for the benefit of the local economy and communities.

To achieve these ambitions, the AEP initiated work in partnership with the tourism industry within Ayrshire & Arran to develop this strategy, with clearly defined outcomes that focus on supporting business growth, creating jobs and improving our communities.

STRATEGY DEVELOPMENT PROCESS

The strategy was developed over a number of months, with extensive stakeholder engagement and consultation. The process began in February 2011 with the completion of a study of 'The Visitor Economy of Ayrshire'. In April 2011, a series of stakeholder workshops were held to collect views and ideas about vision for the sector, current challenges, and what would help develop performance.

A draft strategy was then prepared and an extensive consultation exercise took place over July and August with 14 separate consultation events, an online survey, and consultation with national organisations. The consultation feedback has altered the shape of the overall strategy and highlighted specific areas as important priorities for development effort.

The process highlighted the important contributions made by the private sector, the public sector, voluntary organisations and communities.

Stakeholders all now share the challenge to make these ambitions a reality.

The next step is to establish a Leadership Group and appropriate operational structures to get the focus of effort firmly aligned to the strategy. This will also put in place supporting processes for performance management and communications.

B Our Vision, Aims & Objectives

VISION

Ayrshire and Arran will be a premier destination of choice, where visitors will receive a fantastic welcome and enjoy outstanding experiences of our coastline, countryside, culture and hospitality.

AIMS

Our aims are to:

- secure industry leadership that guides strategic direction;
- proactively market Ayrshire and Arran as a destination of choice;
- maximise quality and focus on excellent service for our visitors;
- enhance our tourism offers and capitalise on opportunities; and
- improve the basic facilities that underpin fantastic visitor experiences.

OBJECTIVES

Within each aim, there will be a range of actions and projects focused on achieving the following strategic objectives by the end of 2017 (STEAM (Scottish Tourism Economic Activity Monitor 2010):

- Increase annual number of visitors coming to Ayrshire and Arran by 10%, from 3.50 million to 3.85 million.
- Increase annual spend by visitors by 20% from £348 million to £418 million.
- Increase employment supported by the sector by 10% from 8,915 jobs to 9,807 jobs.
- Enhance and conserve the region's natural, heritage and cultural assets.

We know these objectives are challenging, but we believe they are achievable if we work together to focus on our shared vision.

STRATEGIC CONTEXT

Tourism is central to the Scottish economy, worth some £11 billion (Oxford Economics, 2010) and supporting around 270,000 jobs.

National agencies including Scottish Enterprise, VisitScotland and EventScotland play important roles in the strategic development of the sector in Scotland and will be key partners in developing distinctive, successful regional offerings.

Tourism is recognised nationally as a key sector and competition is fierce both within the UK and from international markets.

VisitScotland's Tourism Prospectus (published in 2007 after the publication of a national strategy a year earlier) identified the following five drivers for growth:

- Invest – Driver One: Capital Investment
- Shout Louder – Driver Two: Incremental Marketing
- Total Quality – Driver Three: Market Positioning
- 24/7/52 – Driver Four: Capacity Utilisation
- Sell – Driver Five: Cross-selling.

The industry-led Tourism Leadership Group is currently reviewing the national tourism strategy and we will seek to align our work with this. In the meantime, there will be a range of opportunities presented by the Scottish Government's themed years of 'Creative' (2012) and 'Natural' (2013), leading up to the Commonwealth Games and Ryder Cup during the next Year of the Homecoming in 2014.

MARKET CONTEXT

Tourism is a growing and fiercely competitive global sector and the World Tourism Organisation (UNWTO) maintains that international tourism will see sustained growth with international arrivals reaching nearly 1.6 billion by 2020.

It is predicted that, by 2020, 99.6% of the countries in the world will have a tourism proposition (Tourism Intelligence Scotland, 2007). At the same time, global economies are in a state of flux due to international financial crises and recession in major economies.

UK and international visitors will have a greater choice of destinations than ever before so product development, differentiation and strong marketing will be essential to gain a share of an increasingly crowded and fragmented global marketplace. It will also be vitally important that once visitors arrive at their destination they receive excellent customer service and high quality experiences.

SCOTLAND

In 2009, around 15 million overnight tourism trips were taken in Scotland and visitor expenditure exceeded £4 billion (VisitScotland, 2009).

The vast majority (83%) of visitors to Scotland come from within the UK and account for around two thirds (68%) of total overnight tourism revenue. Of the remaining 17% (and 32% of expenditure) the largest market is the USA followed by Germany and France (VisitScotland, 2009).

Tourism is still highly seasonal, with 63% of trips taken between April-September (VisitScotland, 2009), rising to 64% for overseas visitors.

National markets provide an important backdrop for generating priorities at a local level. Domestic visitors are clearly our main market alongside the economic importance of high spending overseas visitors who generate around a third of tourism expenditure, despite only accounting for 17% of visitor numbers. It is important efforts are made to grow numbers of UK and international visitors in an effort to achieve sustainable growth towards the key objectives on volume and value.

AYRSHIRE & ARRAN

The tourism industry in Ayrshire and Arran is relatively well developed, comprising a bed stock of 21,620 beds in serviced (7,360 beds) and non-serviced (14,260 beds) accommodation (STEAM, 2010) and a wide range of attractions and activities that draw visitors to the area.

Tourism is vitally important to the Ayrshire and Arran economy, with 3.5 million visitors generating £348 million of expenditure for the local economy and supporting almost 9,000 jobs across the area (Ayrshire and Arran STEAM Report, 2010).

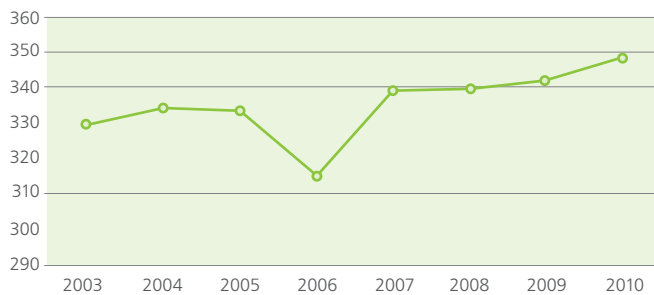
However, tourism revenue in Ayrshire and Arran has experienced only very modest growth in the last seven years – from £330 million in 2003 to £348 million in 2010. This is far below the rate of growth required to meet our ambitious growth objectives in this strategy.

C Strategic and Market Context

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Ayrshire & Arran Tourism Revenue (£m)



Source: Ayrshire & Arran STEAM Reports (2003-2010)

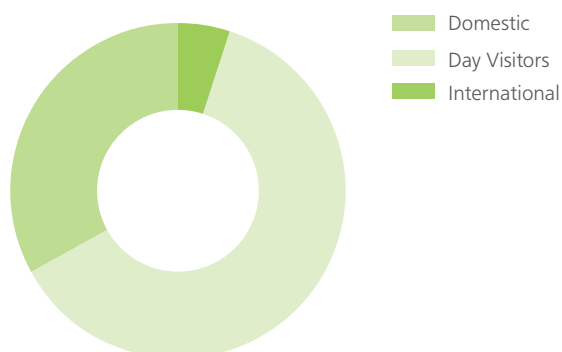
There is clearly considerable scope for development and there is much work to be done in order to grow the contribution of tourism to the regional economy as well as Ayrshire's contribution to the national visitor economy.

The vast majority of visitors to Ayrshire and Arran are from domestic markets, with 62% of people coming as day visitors, 33% domestic tourists, and 5% overseas tourists.

Market Characteristics:

- Day Visitors: low spend; high repeat visitation; over 40% are families with children.
- Domestic Tourists; low spend compared to Scottish average; average stay 3-4 days; majority over 55 years; 70% repeat visitation; 35% stay with friends and relatives.
- International Tourists: high spend; visiting as part of wider trip to Scotland; half from USA, Germany and Sweden; very high proportion (60%) staying with friends and relatives.

Origin of visitors to Ayrshire & Arran



Day visitors account for almost two thirds of visits to the area. Day visitors are of undoubted value and it is a strength that the region attracts visitors on day trips due to our favourable geographic location close to the highly populated central belt.

However, it is important to create greater linkages and packaging between businesses and sectors to create a more joined-up visitor experience which encourages higher spend-per-day.

More work also needs to be done to increase the number of visitors staying within the area for holidays and short breaks – staying visitors have a much greater economic impact in terms of spend-per-day.

We need to understand and continually monitor and research our visitor profile to ensure we meet visitor needs and exceed expectations. In order to achieve this, we must be proactive in collecting feedback from visitors across the sector and sharing that information so everyone can benefit from a greater understanding of our customers. This will allow us to make informed decisions about future developments, addressing any gaps in current provision, and marketing products to key audiences and emerging market segments.

EMERGING TRENDS

In light of increasing competition, it is important our strategy is informed and continually developed to respond to emerging trends and changes in consumer behaviour and market forces.

Some of the key emerging trends considered in the development of the strategy include:

- Value for money messages are important.
- Quality is crucial in the digital age as consumers interact 24/7 using mobile communications and social media channels to review, recommend and share experiences.
- Holidays and leisure breaks remain a vital part of consumer lifestyles despite recession.
- Trends towards more older visitors, who are more active and have a younger outlook.
- International markets affected by economic concerns and exchange rates.
- Lasting trend towards late bookings and short breaks as evolution of 'staycation' effect.
- Consumers seeking local produce and authentic food as part of overall visitor experience.

Ayrshire and Arran must focus on these key growth markets by:

- Targeting the domestic market by developing integrated packages of activities and experiences that meet consumer aspirations.
- Providing added value – improving the visitor experience with exceptional customer service and strong product knowledge.
- Developing and promoting unique experiences that highlight the area's assets to targeted customer segments.
- Using traditional and new media to connect with customers on an ongoing basis.
- Extending the visitor season using events and pricing/ packaging of activities and experiences.
- Offering authentic food and drink experiences which add value to visitor experiences.
- Improving quality in all that we provide and using credible Quality Assurance schemes as widely as possible.

D Our Strategy

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EXPERIENCES

We must deliver great visitor experiences if we are to achieve our objectives. Without this, we cannot grow visitor numbers or encourage the increased level of spend we are aiming for. The essential elements that will deliver these experiences are:

- a wide range of compelling 'must see' and 'must do' offers, presented in appealing packages aimed at defined market segments;
- consistent, excellent service;
- consistent, reliable delivery of the basics that complement the offers – for example, accommodation, transport, skills and product knowledge;
- clean, high quality public spaces;
- easily accessible information that makes it simple for the visitor to discover, choose, travel and do; and
- a year-long programme of events and festivals that showcases the very best our area has to offer.

STRATEGY

The key strands of our strategy to deliver superb experiences and achieve our objectives are:

LEADERSHIP

- The industry will wholeheartedly own the strategy implementation and work in a unified way to mobilise businesses and communities, supported by the public sector players, to work together to achieve more.
- A Leadership Group will be the custodian and champion of the strategy and inspire all of the stakeholders to get engaged and develop actions.
- Strong, effective leadership at all levels across the industry will encourage collaboration to develop our offers and deliver the highest levels of service excellence.

MARKETING AYRSHIRE & ARRAN

- A marketing and communications plan will underpin delivery of the strategy.
- This will focus on marketing Ayrshire and Arran as a distinctive destination.
- We will mainly focus on the key market segments for whom the region has most to offer – mature devotees, affluent active devotees, younger domestic explorers and the day-trip market of families and couples from central Scotland.
- Our marketing will align with the national and regional promotions of VisitScotland.
- We will consistently use a single regional brand for Ayrshire and Arran, which will identify the region as a distinctive destination, supported by consistent communication of the main strengths of our visitor offer. It will be used by all industry stakeholders in promotional activities.
- We will raise our collective understanding of the wants and motivations of visitors by disseminating research and intelligence across the sector.

INFORMATION AND VISITOR SERVICES

- We will collate and supply information that is consistent, accurate and accessible.
- We will review and develop the provision of visitor information within the region, including Visitor Information Centres and wider networks, as well as brochures, timetables, and other practical information for the visitor.
- We will encourage online presence and booking capabilities.
- We will make information and contacts easily accessible across the sector.
- We will develop familiarisation activities and sales skills to enable an increased level of cross-selling and up-selling that will enhance the visitor experience and maximise their time in our area.
- We will encourage investment in technology and use of innovative approaches to ensure information and promotional offers are available in the ways our visitors prefer.

OFFERS

- Our strategy will be driven by a clear focus on key market segments.
- We will focus on eight distinct offers, although the approach to each will differ.
- The industry will develop our offers to ensure further product development and packaging.
- Collaboration and networking will play a vital part in bringing the private sector, third sector and communities together in the development of offers.

THE BASICS

- We will ensure we get the basics right to raise the standards of provision.
- We will consider how the basics integrate with our offers to develop and promote packages aimed at our main target market segments.
- Quality and service excellence will be at the heart of all we do.

EFFECTIVE PARTNERSHIP WORKING

- We will encourage all stakeholders to get involved: businesses, the voluntary sector, communities and public sector.
- We will support increased collaboration and co-operation through developing relationships and mutual understanding between stakeholder groups.

SIGNATURE PROJECTS

- Action-planning for years one and two will assess the need for signature projects, which will be determined by the Leadership Group.
- These will be fundamental aspects of improving experiences, with a broad relevance to the sector, where significant performance improvements can be delivered relatively quickly
- Possibilities include: customer service excellence; innovation (especially around our offers); or enhanced information provision.

E Our Offers & Opportunities

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INTRODUCTION

Ayrshire and Arran has a fantastic range of assets and these are the foundation of an already strong and vibrant tourism sector. This section considers the most significant of our offers in terms of what we already have, and how they can be strengthened and developed to appeal to distinct market segments to achieve our strategic objectives

In reality, the eight individual offers do not stand in isolation of each other – the real world is a mixture of them all, with visitors enjoying elements of different offers within a single visit. They simply provide a way to identify potential development actions. In addition, the region has other distinct facilities and features to offer the visitor, such as Ayr Racecourse, which are also very important in developing the sector in future.

The approach to each of the offers will not be the same, nor will the degree of emphasis placed on each – they offer different opportunities for improving yield and contributing to the delivery of the strategic objectives.

The strategy consultation provided clear views on the eight offers, which we have grouped and prioritised. This provides a guideline when considering the relative importance and weight of effort that should be placed on the development activity related to each offer.

There are a variety of providers – private sector, public sector, voluntary groups and communities and all will contribute (to varying degrees) to the success of every offer.

When developing the offers, it will be critically important to be clear about the specific market segments we wish to attract, taking a market-led approach to development.

OUR OFFERS – A SUMMARY

OFFERS	CHARACTERISTICS	POTENTIAL YIELD
Culture, Heritage & Burns Activities & Natural Environment	High potential for development of new or enhanced offerings	VERY STRONG
Golf Sailing	Already strong, core, offers with great scope for further exploitation	VERY STRONG
Arran	Distinctive 'Scotland in miniature' island destination with strong market appeal	
Food & Drink Islands	Complementary offers that can add greatly to visitor experiences and increase spend/stays	STRONG
Weddings & Civil Partnerships Business Tourism	Niche offers which, although smaller in scale, are strong offers with scope for further development	MODERATE
Events & Festivals	Cross-cutting all the offers, with potential to provide a programme of strategic events and festivals, which showcase our offers and attract visitors	COMPLEMENTS ALL OF THE OFFERS

This is a snapshot of the opportunities provided by each offer. The 'characteristics' broadly indicate the nature of the opportunity and the 'potential yield' relates to the extent to which each offer can contribute to the delivery of the strategic objectives.

Events & Festivals is a cross-cutting aspect which, with the right development, could deliver a strategic programme over the year that showcases the best aspects of our offers and helps deliver the potential contributions to our objectives.

1. CULTURE, HERITAGE & BURNS

Ayrshire and Arran has a rich and diverse heritage that has many aspects of international renown, most obviously Burns. Although Burns is a key attractor for many tourists, there is much, much more on offer, spanning our social, religious, military and industrial past. There is also a vibrant and varied cultural life for visitors to enjoy and participate in, including historic attractions, museums, galleries, theatres and contemporary art. There is an extensive and growing range of archives, and opportunities for access to historical sites and materials that enable the visitor to walk in the footsteps of their ancestors.

We will seek to raise the profile and the quality of presentation of our offerings in this category, making it easier for visitors to enjoy connected experiences in heritage, culture and ancestry, alongside complementary aspects such as food and drink.

Possible areas of action:

- Develop more joined-up offerings that will sell unique experiences.
- Improve product awareness and develop cross-selling practices.
- Develop the events/festivals offering, including a contemporary angle that strengthens the appeal of Burns and other areas of heritage to a younger consumer.
- Build and exploit links to appealing social and cultural themes.
- Undertake further assessment of the most significant culture and heritage offerings, from the perspective of market potential.
- Explore scope for improved packaging and promotion to niche customer groups.
- Identify the most important related offers, such as golf, for further integration with cultural or heritage offerings.
- Align the promotion of culture and heritage with VisitScotland's *Ancestra*/Scotland marketing activities.

2. ACTIVITIES & NATURAL ENVIRONMENT

Ayrshire and Arran has a varied and accessible natural environment. The countryside, coastline and seas offer a rich variety of landscapes, wildlife, habitats and geology for the visitor to enjoy and experience. There are emerging distinctive offerings and opportunities, such as establishing part of the Galloway Forest Park as the UK's first Dark Sky Park and probably Scotland's first UNESCO Biosphere designation. However, the level of activity tourism is currently low and generally under-developed on mainland Ayrshire, with great potential to develop infrastructure, facilities and build this offering in areas such as walking, cycling, horse-riding and watersports. The market for adventure sports and activities is well established on Cumbrae, and Arran in particular, and opportunities exist to build upon the profile of our islands for outdoor activities.

Potential areas of action:

- Product development for walking and cycling, to package products more effectively for particular customer profiles.
- Infrastructure enhancements, such as joining up paths and cycleways, working with communities and businesses to provide improved facilities.
- Promote the development of related hospitality facilities through VisitScotland's various 'Welcome' schemes.
- Encourage and facilitate collaboration among providers to overcome fragmentation and offer stronger, packaged experiences, tailored to distinctive market segments.
- Explore ways to attract more adventure and activity operators into the area.

3. GOLF

Ayrshire and Arran has a world-class golf offer that spans from its three world-famous Open Championship courses with unique heritage, through to relaxed, accessible holiday golf experiences set in fabulous landscapes. This offer is already a core strength and attractor for large numbers of high-yield visitors. However, there is a growing level of competition from many other destinations and development activity is required to drive innovation in the way this offer is packaged and promoted to both domestic and international visitors.

Potential areas of action:

- Focus international visitor development on key markets in the EU as well as the USA.
- Sustain a broad-based approach that appeals across all the golfer profiles.
- Develop more and better packages and incentives that are tailored around the golfer profiles.
- Find new ways to make more of the profile and broad international media coverage that we get from the major golf tournaments taking place in Ayrshire and Scotland.
- Explore scope to develop the linkages to other offers such as Food & Drink and Culture & Heritage.
- Assess potential to make more of events and festivals.
- Raise visitor awareness of the accessibility of Ayrshire and Arran's golf experiences from Glasgow and Edinburgh airports, with travel times of around 35 and 75 minutes respectively.
- Explore ways to work with Infratil to attract new routes to Prestwick from key golf markets, such as Scandinavia and Germany.

4. SAILING

Sailing is a growing market with a demonstrated resilience to recent economic pressures. Ayrshire and Arran has a very strong offer, with world-class facilities and events of international standing, excellent infrastructure, but with some current capacity constraints. The area provides great scenery, islands, safe sailing waters and lack of crowds, all of which contribute strongly to desired experiences. Visitors coming to Ayrshire and Arran for sailing are recognised as high spenders in associated areas such as sail training, as well as food and drink, accommodation, entertainment and retail.

Like golf, we already have a well-developed offering that has a distinctive strength within northern Europe. However, with the right development, there is potential for this offer to make a greater contribution to the strategic objectives, building on recent developments, such as the Sailwest project.

Potential areas of action:

- Encourage further investment in the development of dockside and on-shore facilities at main locations.
- Work with stakeholders at sail-to locations to enhance facilities and increase overall activity levels.
- Develop the related food and drink offerings.
- Explore scope to expand related product areas, such as sail training.
- Develop day-trip packages to offer alternative experiences to non-sailing companions.
- Assess existing events programme for opportunities to do more, develop on-shore elements, extend to other locations, and appeal to additional visitor groups.
- Review existing sailing developments to ensure pace of implementation is ahead of potential growth in demand.
- Develop associated marine leisure activities, such as wind-surfing.
- Develop tailored customer service improvement activities, including a focus on schemes such as 'Welcome Ashore' around key sailing locations.

5. FOOD & DRINK

Ayrshire and Arran has a great food and drink offer, with the very best of produce available to the visitor through shops, markets and a diverse range of eating options, including some of Scotland's very best restaurants. There are distinctive Ayrshire foods and beverages, as well as the highly successful 'Taste of Arran' branded range.

The food and drink offer complements other offers and plays a central role in delivering great experiences. Visitor expectations are centred on local, authentic, high quality produce, offered in ways that significantly reinforce a distinctive and enduring regional character.

It is the second largest category of expenditure for the tourist and has become a key part of the 'entertainment' purchases visitors will make.

Potential areas of action:

- Harness the potential of the area's food and drink offer as a key component of destination marketing and developing a sense of place.
- Improve the promotion of locally-produced quality products that extends through to both local retailers and restaurants.
- Further research and development of festivals and events activities relating to food and drink.
- Improved product knowledge, awareness and recommendations to visitors from hospitality staff.
- Development of hand-on experiences in food production and cuisine as an integral part of the visitor experiences on offer.
- Wider development of associated products, such as farmers' markets, for the visitor.

6. ISLANDS

In addition to the major part Arran plays in our destination as a stand-out island – recognised widely as 'Scotland in miniature' – there are a number of other islands, such as the Cumbraes and Ailsa Craig, which can add an accessible extra dimension for visitors seeking experiences around other offers, such as sailing, activities and the natural environment.

Islands play an important role as an offer in their own right, as well as in complementing other offers.

Potential areas of action:

- Create linkages between our islands offering and visitor activities on mainland Ayrshire to extend length of stay.
- Explore scope to market as the accessible alternative to the inner and outer Hebrides.
- Ensure the islands' dimensions are fully reflected into the plans being developed around other offers.
- Maximise the value of Arran's clear identity and develop the links between it and mainland Ayrshire.
- Further consider how the sea can be exploited as part of the islands offering for visitors, for example, using the Lamlash no-take zone to encourage divers, marine wildlife watching, etc.

7. WEDDINGS & CIVIL PARTNERSHIPS

Ayrshire and Arran's offer performs very well, with a great range of award-winning venues for ceremonies and receptions in close proximity to Scotland's population centres. The area also has a good range of leisure, entertainment and retail options, which are important factors in selecting wedding locations

Potential areas of action:

- Explore scope for further product innovations that will help ensure our offerings appeal strongly to all the key market segments and compete with alternative locations.
- Review current promotional and packaging activities to identify opportunities to up-sell elements of the wedding packages, such as florists, photographers, and taxis, to improve the overall financial benefit to the locality.
- Exploit strengths in specialist and independent retailers, linked to wedding planning activities.
- Exploit the natural environment and heritage assets to promote Ayrshire and Arran as a wedding destination.
- Develop promotional activity to attract more wedding and civil partnership tourists, as well as extending guest stays and overall spend.

8. BUSINESS TOURISM

Business tourism is a relatively small market for Ayrshire and Arran, despite the high-yield profile of business tourists. We have some excellent facilities already, and will encourage further development to broaden our offer to strengthen our overall appeal in this demanding market. However, located in close proximity to major conference and corporate destinations in Glasgow and Edinburgh, there is some scope to develop the offer. Recent developments, such as the new University of West of Scotland campus in Ayr, as well as being home to a number of major employers and inward investors, creates new possibilities for developing the value generated by this offer.

Potential areas of action:

- Develop a co-ordinated approach to targeting opportunities within the small conference market.
- Work with existing conference and meeting venues to identify and develop cross-selling and packaging opportunities.
- Capitalise on our excellent colleges and university facilities to exploit academic conferences and related opportunities.

EVENTS & FESTIVALS

Events and festivals have a very important role to play as a means of showcasing the very best Ayrshire and Arran has to offer across all areas, and as a way to encourage visits and increase visitor spend. Within the implementation of the strategy, we need to raise our ambitions and perspective of how events and festivals can contribute to the development of the sector as a whole, as well as supporting our offers at the Ayrshire and Arran level.

Potential areas of action:

- Develop a strategic approach to events and festivals development with significance at the Ayrshire and Arran level.
- Improve co-ordination, including the development of a central events calendar that assists a wide range of providers to exploit these as a means to attract more business, extend the season and improve yield for the sector as a whole.
- Develop a programme of significant events or festivals, either by expanding existing localised events or developing and attracting new events to the area.
- Work closely with key agencies, such as EventScotland, VisitScotland and Creative Scotland and make the most of the forthcoming themed years, culminating in the Year of Homecoming in 2014.
- Combine different elements into events from across the various offers.
- Use key events to maximise consumer PR and opportunities for building sense of place and destination branding.

Successfully developing and exploiting our offers lies at the heart of implementing the strategy and achieving the strategic objectives. However, it is impossible to do this without having consistently strong provision across a number of basic areas that have the potential to cement high quality experiences for our visitors.

Getting the right range and quality of provision across these basics is a vital part of the strategy. As with the offers, this will require all the relevant stakeholders to focus clearly on what the visitor expects and ensure this is consistently exceeded.

Although all the basics are important, the consultation produced some clear views on priorities:

- Public realm and cleanliness is a clear concern and priority.
- Product knowledge is also given high priority, especially as it relates to delivering excellence in customer service.
- Another high priority is collaboration and networking, including cross-regional collaboration, where appropriate. This includes a desire to see true partnership working on the implementation of the strategy.

1. SIGNAGE, PUBLIC REALM, AND CLEANLINESS

Our aim is to deliver clean, accessible high-quality, high-amenity public spaces, with good signage and other orientation information that helps visitors find their way around easily.

Potential areas of action:

- Assess the signage, public realm and cleanliness improvement requirements and priorities in each Council area.
- Target street cleaning operations at important visitor locations.
- Streetscape improvements, including signage, on key routes to, and in the vicinity of important tourist locations within Ayrshire and Arran.
- Improve access to toilet provision and/or development of comfort schemes.
- Assess business and/or community collaborations to identify opportunities to develop initiatives that enhance particular visitor locations.
- Improve provision of orientation information, such as maps and signage.

2. PRODUCT KNOWLEDGE

This aspect of the basics is essential in supporting the delivery of excellent customer service.

In the tourism sector, product knowledge needs to extend well beyond one's own offering to a wide range of complementary offerings that can be cross-sold and up-sold, as well as a general knowledge of the area and its attributes. Visitors are receptive to, and appreciate, the recommendations of staff as a means of discovering the local 'hidden gems' that enrich their experience and sense of authenticity. Their expectation is increasingly that not only will staff be well-informed, but that their pride and passion for all that is on offer will be evident and sincere.

Potential areas for action:

- Develop a single, widely recognised tourism business-to-business portal for uploading and sharing information, as well as successful practices.
- Develop and expand familiarisation (FAM) activities among local businesses, tour operators, travel trade press, and transport operators.

3. COLLABORATION & NETWORKING

There is a very strong and consistent view from industry stakeholders that significant improvement in our effectiveness in collaborating and networking is essential to deliver the strategy and collectively raise our game. This includes collaboration both within and across particular interest groups, with industry players acting as the initiators and drivers of activities.

Potential areas of action:

- Develop an ongoing programme of networking events and mechanisms, both face-to-face and online, around areas of interest to industry stakeholders.
- Encourage individual businesses to initiate or join collaborations that will help drive improvement and growth.
- Develop a tailored mentoring/facilitator programme to build capacity and support the development of collaborations.
- Encourage and support collaborations utilising existing programmes and initiatives, such as Scottish Enterprise's Tourism Innovation Workshops.

4. QUALITY & CUSTOMER SERVICE EXCELLENCE

High standards of customer service are essential in developing our reputation as a premier visitor destination. To succeed in this increasingly competitive marketplace, businesses need to be visitor-led while striving to improve the quality of their products and services.

Customers' expectations are continually increasing as they seek high quality, value for money experiences. Modern technology now allows consumers to review, recommend and share their experiences more widely than ever before so we need to ensure that hospitality meets, or preferably, exceeds visitor expectations. While part of any holiday is discovering new things, people like to know what they're going to get from the businesses they encounter. The VisitScotland Quality Assurance scheme is internationally recognised and trusted by travellers and it tells customers what to expect from the business. Additionally, it helps businesses benchmark themselves against others.

Potential areas for action:

- Work with VisitScotland to encourage increased participation of Ayrshire and Arran businesses in the VisitScotland Quality Assurance schemes and Welcome Schemes.
- Promote the benefits of quality, by embedding quality assurance, in all activities.
- Ensure quality is at the heart of product development and new business start-ups
- Investigate tools to collect feedback that can be used to inform future improvement activities.
- Create a programme that unifies the effort to improve customer service across the sector.

5. TRANSPORT GATEWAYS, ROUTES & CONNECTIVITY

Making strong first impressions at our key gateway locations is important, both in terms of public realm and provision of appropriate information. Once the visitor has arrived, it is vital they can get information that enables them to choose things to do that are easy to access, whether using public or private transport, and live up to their expectations.

Potential areas of action:

- Identify key arrival points to assess requirement for cosmetic/public realm works and provision of information.

- Improve directional signage from main arterial routes leading into Ayrshire and Arran.
- Develop collaborative approaches with neighbouring areas, such as Dumfries and Galloway and Northern Ireland, to allow visitors to easily move around south-west Scotland.
- Raise awareness of the relatively short travel times to get into Ayrshire in light of recent trunk road improvements, especially from Edinburgh and Glasgow airports.
- Encourage the development of transport links between key attractions and main visitor arrival points.

6. SKILLS

Given the nature of the tourism sector, with a high emphasis on personal service delivery, considerable attention and resource needs to be directed at the skills-related performance issues, with a Scottish Tourism Skills Strategy currently in implementation (2010-15). Ayrshire and Arran already has good provision of tourism skills training through our colleges and a number of other commercial training providers, with the ability to address the industry's requirements. To successfully deliver the strategy, there is a need to develop management skills and nurture leaders within the sector, as well as to continue to address core skills. Developing fresh approaches to promoting the industry, especially to young people, will improve career choices and help attract talent to the sector.

Potential areas of action:

- Improve the links between industry and local schools and colleges.
- Increase awareness of funding support mechanisms.
- Identify where skills gaps or targeted skills development opportunities exist and deploy tailored development programmes to address these.
- Raise awareness of the main local tourism training providers among industry.
- Promote apprenticeships in the sector as a means of attracting talent and developing career paths.
- Make more use of volunteers who bring extensive sector experience and expertise to mentor trainees.

7. ACCOMMODATION

Accommodation plays an essential part in the supporting infrastructure and is the single largest element in overall visitor spend. There is high quality provision in all segments with many award-winning accommodation providers, ranging from exceptional top-end hotels through to some major providers in segments such as caravanning and camping. Targeted development of accommodation provision, tailored for specific market opportunities, can play a significant part in growing the sector. It will therefore be important to encourage appropriate development of the accommodation offering alongside the development of our main offers.

Potential areas for action:

- Undertake an accommodation audit to identify specific gaps in accommodation provision and inform plans for future development.
- Raise awareness of the potential for rural diversification into tourist accommodation and associated activity provision.
- Encourage improvements in accommodation provision where there are identified opportunities.
- Look at developing specific investment propositions for promotion to potential investors (where strategic gaps in accommodation provision can be identified).
- Encourage uptake of relevant quality accreditation and 'Welcome' schemes.

8. INFORMATION & COMMUNICATIONS TECHNOLOGY

Information & Communications Technology (ICT) has the potential to help dramatically improve business processes, better inform frontline staff, and enable enhanced service provision for tourism businesses. For the visitor, it can provide easy-to-use, accessible information that enables them to make good choices and customise their experience of Ayrshire and Arran. Research confirms the growing significance of ICT (Tourism Intelligence Scotland: latest Trends June 2011):

- Globally, the use of mobile devices to access visitor information grew from 27% of visitors in 2010 to 52% in 2011.
- 79% of business tourists use technology to access information in planning visits.
- Use of travel websites to plan trips grew by 11% in the last year.

The consultation indicated a need to develop a more coherent approach for Ayrshire and Arran, with better management of content and enhanced use of mobile applications and social networking.

Potential areas for action:

- Raise the overall level of provision of online information and booking or buying facilities.
- Improve the provision of ICT advice within the existing business support services.
- Up-skill people within the industry to make more effective use of ICT in enhancing customer service.
- Make more effective use of core web technology and focus efforts on existing consumer sites, including VisitScotland.com.
- Maximise use of social networking media and opportunities.
- Explore development of Ayrshire and Arran 'apps' that enable anytime/anywhere access to relevant information and facilitate transactions as required.
- Develop linkages between web-based information in a way that allows easily navigated, intuitive exploring of tourism options by the visitor.

9. FUNDING

Many tourism businesses are under considerable funding pressures, often finding it difficult to generate sufficient profits to reinvest in their business. There is a need to encourage commercial performance improvement initiatives, such as developing premium product offerings, making better use of cross-selling and improving yield – all of which can generate funds and enable reinvestment. Considering innovative approaches to funding will be an important element in developing the basics, as will raising awareness among funding providers of the needs of the sector.

Potential areas for action:

- Assess possible use of sector-based or geographically-based Business Improvement Districts, or similar mechanisms for incremental investment in local improvement.
- Collaborate on the use of available EU funding programmes, within the constraints of available match-funding and priorities.
- Raise awareness across the industry and major lenders of the commercial funding opportunities for business investment and growth.
- Maximise and encourage use of sector-specific funds, for example, from VisitScotland, EventScotland, Creative Scotland and others, as well as funds that become available in relation to the specific Theme years leading up to 2014 and beyond.

10. REGULATION

Tourism businesses generally understand the role of regulation and are tolerant of many aspects of 'red tape'; however, they are frustrated by aspects that are seen as unnecessarily complex, inconsistent and obstructive. In some instances, regulation may be necessary and clear, but there are issues about communications and understanding by the industry. Additionally, there are sometimes frustrations based on inconsistencies in approach. The growing shared services agenda should assist in addressing these concerns.

Potential areas for action:

- Develop agreed policy guidelines across the three Ayrshire Councils.
- Raise awareness and familiarise those services/agencies whose staff work directly with the sector.
- Develop good practice guides that help tourism businesses navigate the regulations associated with particular activities – for example, planning and running events/festivals.

Ayrshire and Arran comprises a rich and diverse range of localities, all with distinct characteristics and heritage. Often, discovering more about the distinct nature of a locality is of interest to the visitor and plays a significant part in the overall quality of their experience. This aspect of the tourism offering is frequently driven by community groups who have the passion and knowledge to bring this to the fore for the visitor.

There are already a number of 'place' initiatives that can be used as vehicles for the development of enhanced locality dimensions for visitors. Regeneration projects can make an important contribution. However, community groups tend to be active in smaller settlements and may be the only feasible way to undertake place development in many localities.

Many Ayrshire events are driven by local groups of volunteers and societies – for example, Darvel Music Company (a voluntary community group) demonstrates how, with some public funding, community groups can deliver a sustainable project, strengthening the tourism offer in Ayrshire.

Potential areas for action:

- Ensure the strategy is widely disseminated among community groups and localities across Ayrshire and Arran.
- Encourage place-related initiatives that align with wider strategy themes and add to the overall diversity of our offers and potential visitor experiences.
- Identify and promote good practice examples that will help stimulate initiatives within Ayrshire and Arran.
- Encourage existing community/place development activities to integrate into wider developments linked to the tourism strategy.
- Encourage networking and collaborations to avoid duplication of effort.
- Encourage and facilitate knowledge exchange opportunities to maximise growth potential.

Analysis of the markets for our offers and opportunities suggests it is unlikely that any one opportunity will, in isolation, yield the level of growth needed in our visitor economy. Instead, attracting more tourists to spend more money will depend upon increasing the diversity of experiences and activities which build on the area's image. Central to this is developing the image of Ayrshire and Arran as a tourism destination.

DESTINATION MARKETING

"A destination is a place where people want to be." (Hayman, 2006)

Marketing of destinations at all levels has become increasingly competitive but there has been a lack of co-ordination and fragmentation of messages about Ayrshire and Arran. To stand out from the crowd, destinations must capture people's attention, inspire and forge positive reputations through compelling messages and stories. The challenge for Ayrshire and Arran is to organise the promotion of our assets in a coherent and creative way to form a compelling proposition for consumers. By conveying and reinforcing positive images of the area over a sustained period of time, we will ensure Ayrshire and Arran is identifiable and attractive to potential visitors when making decisions to select one destination over another.

IMAGE & BRAND

Development and promotion of a consumer-focused destination brand to differentiate the area and position it within a competitive marketplace is of great importance and must be viewed as a priority in strengthening the appeal of our area for visitors.

The *Ayrshire & Arran logo* (below) was developed with input from a range of public and private sector stakeholders and launched in 2010 for use across a range of sectors. This logo will be embraced and further developed for use across all media channels, contributing to a strong and instantly recognisable destination and sense of place.



A range of iconic images, reflecting the best of the area's landscapes and high quality experiences, will also be central to building a strong destination brand.

The destination brand must be flexible enough to be tailored for use in marketing the area to diverse audiences and niche markets. Therefore, development of a brand toolkit and resources for businesses and other stakeholders to align their marketing messages with the destination brand will ensure greater consistency and effectiveness of marketing efforts.

MARKETING AND COMMUNICATIONS

Effective marketing and communications is an essential component of our strategy to grow the economic value of tourism.

There is currently a wide range of online and printed marketing materials ranging from commercial websites and leaflets for attractions to micro-sites for festivals and newspaper advertising. Quality and effectiveness of these activities varies greatly and there is a lack of consistency and co-ordinated approach in the marketing messages about the area.

In order to address this, resources will be targeted where they will yield maximum return by reducing duplication and targeting visitors we know have an affinity with the area.

Marketing will be undertaken at destination level, utilising VisitScotland to deliver a range of marketing campaigns and activities on an annual basis. VisitScotland will communicate with tourism operators across Ayrshire and Arran to offer a range of marketing opportunities for businesses to promote their products and services through an array of regional and national campaigns, websites, leaflets, brochures, PR and press trips, trade shows and exhibitions.

This will be augmented with bespoke marketing and communications activity, where appropriate, to achieve a balance between retaining existing customers and acquiring new ones.

TARGET CUSTOMERS

Marketing of Ayrshire and Arran will be built around VisitScotland's UK marketing strategy and segmentation model, focusing activity on the following key customer segments:

- Mature Devotees (5.1% of UK population, 1.3 million households).
- Affluent Active Devotees (6.7% of UK population, 1.7 million households).
- Younger Domestic Explorers (4.6% of UK population, 1.2 million households).
- Day Trip Market – Families and couples within Scottish central belt.

Focusing on UK markets will deliver the greatest return on investment (ROI) for Ayrshire and Arran. However, VisitScotland also deliver national marketing and PR campaigns which have international reach, providing benefits to Ayrshire's tourism industry. This activity will continue to be important, especially in areas of particular product strength such as golf and sailing.

This segmentation will inform and guide the marketing activity, but a range of thematic and niche marketing activity will also be required to develop offers and opportunities and grow the area's appeal.

In order to achieve more effective marketing and communications, it will be important to develop a new pan-Ayrshire tourism marketing plan to reduce duplication, provide a co-ordinated approach to marketing our area, and deliver measurable returns on investment (ROI) for the area.

Therefore, delivery of destination marketing and communications will be focused towards key market segments, highlighting the area's product strengths, and reinforcing key messages and destination brands through a range of channels and mechanisms including:

- activities delivered through VisitScotland seasonal campaigns;
- consumer PR and communications;
- thematic marketing campaigns;
- social media and new technologies;
- events and exhibitions.

VISITOR INFORMATION

Information provision is an important part of the visitor journey as it orientates visitors once they arrive in the area, and influences discretionary plans and spending during their trip.

Currently Visitor Information Centres (VICs) are operated in Ayr, Brodick and Largs (seasonal) providing tourists with information and booking facilities once they have arrived in the area. Performance of VICs nationally has declined over recent years due to the availability of online information, but the role of VICs is still viewed as important within any area wishing to attract tourists.

Increasingly, areas of high footfall such as Glasgow Prestwick Airport, ferry terminals in Troon and Ardrossan, visitor attractions, accommodation providers and supermarkets are used to display unmanned information in the form of leaflets, maps, and brochures. This is predominantly through third party, commercial agents, and provides visitors with some printed tourist information within Ayrshire and Arran although there is no interactive or human presence. This information usually extends well beyond Ayrshire and does little to convey a sense of place for the area. A planned approach to unmanned information that reinforces Ayrshire and Arran branding and ensures delivery of essential visitor information at key sites is required to address this issue.

Provision of comprehensive online visitor information for Ayrshire and Arran, with downloadable resources such as maps and leaflets, would allow information to be accessed anytime, anywhere by visitors. This will provide a co-ordinated presence for tourism information which can also be utilised by tourism operators to field enquiries from visitors.

I Delivering The Strategy

It is essential we have the structures in place to drive forward the strategy. The industry is looking for a unified voice on Ayrshire and Arran tourism and a clear point of contact. As this strategy is based on a partnership approach, the whole sector (private, voluntary, community and public) needs to be integral in both overseeing the strategy and its implementation.

To ensure we are achieving our objectives, a robust process for reviewing progress against targets and milestones on an annual basis must be in place. The review process needs to be at the heart of a drive to become more demanding about the future growth of tourism in the Ayrshire and Arran area. The first review should be held in six months from approval of the strategy and then annually to guide spending decisions for subsequent financial years. The Leadership Group will be responsible for leading this review and reporting to the Ayrshire Economic Partnership and to the industry.



To oversee the strategy an Ayrshire and Arran Tourism Leadership Group will be established. The Group will comprise around 12 members, the majority of which will be from the industry including the Chair – the three councils would be represented on the Group. As owners of the action plan that will arise from the strategy, the Group will agree the respective responsibilities and specific actions of the plan by February 2012.

The Ayrshire and Arran Tourism Leadership Group will be supported by a dedicated Tourism Team led by an Ayrshire and Arran Tourism Manager. The remit of the team will be the achievement of the objectives, working closely with partners, to deliver specific strategic pan-Ayrshire projects, reporting progress against strategic projects, milestones and targets and raising any emerging issues, challenges and opportunities. This small team, drawn, at least initially, from the three councils will work in partnership with other organisations or agencies and those individuals who responded to our ‘call for action’ during the public consultation phase.