
BRIDGING THE GAP

Wholesalers



Suppliers

S
COTTISH

W
HOLESAL

A
SSOCIATION

BRIDGING THE GAP

Destination 2030 Join us on our Tourism Journey

Marc Crothall

CEO



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Tourism is Everyone's Business

Visitor Economy

Professional Services

Lawyers
Accountants
PR and marketing
Banking
Insurance
Interior designers
IT services



Things to do

Activity providers
Restaurants
Pubs and Clubs
Music venues
Shops
Attractions



Day to Day suppliers

Laundry services
Builders/trades people
Drinks suppliers
Food providers
Cleaners
Gardeners
Crockery suppliers
Carpet suppliers



Transport

Car hire and taxi companies
Airlines
Trains operators
Ferry companies



Event Services

Wedding planners
Conference planners
Florists
Hairdressers
Marquee providers

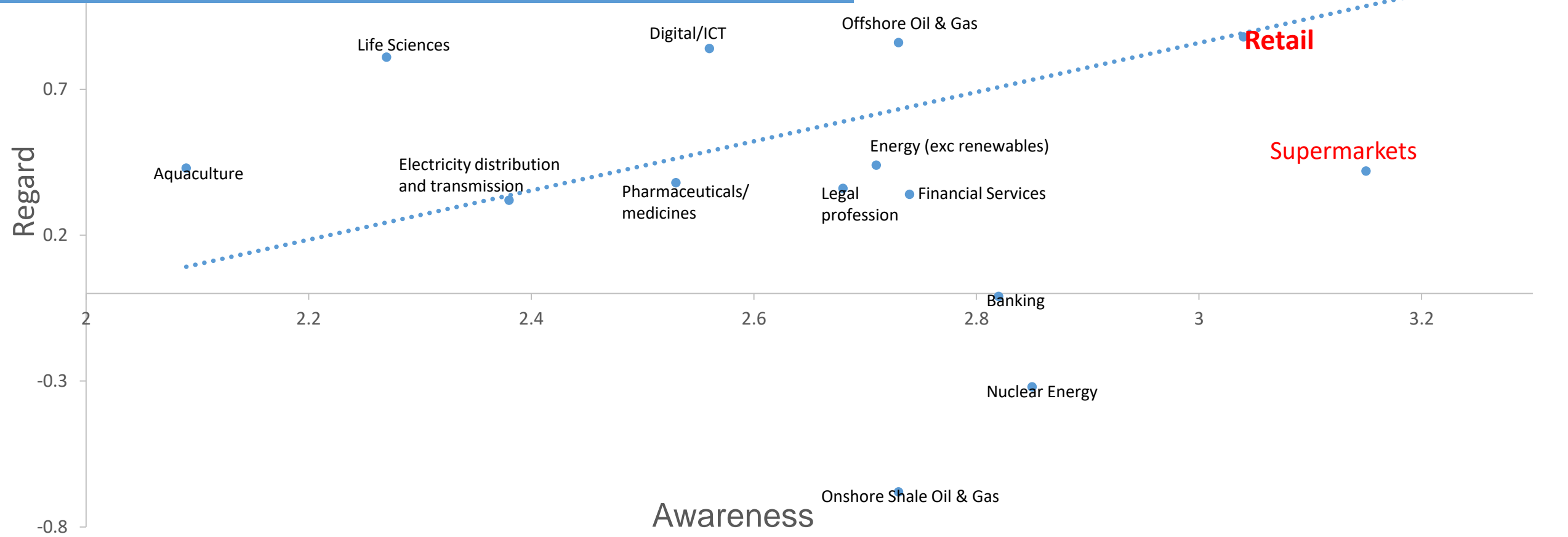


Investment opportunities

Image of Scotland
Welcome of Scottish people
Connecting business and tourism
Scotland as a place to visit and invest



Tourism is the best known and best regarded sector of the Scottish economy by Scotland's MSP's



Base: Awareness - All MSPs (73); Regard - all who have at least heard of each

**THE SCOTTISH
TOURISM ALLIANCE**

LEADING ON INDUSTRY MATTERS



A TOURISM INDUSTRY MANIFESTO FOR
GROWTH & COMPETITIVENESS TOWARDS 2020

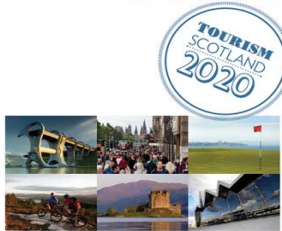
**COMPETITIVENESS
SUSTAINABLE GROWTH
& INVESTMENT**

TOURISM BUSINESSES

**CONFIDENT OR
CONCERNED?**

REPORT ON THE FACTORS
AFFECTING TOURISM BUSINESSES IN
SCOTLAND

A STRATEGY FOR LEADERSHIP AND GROWTH
**THE FUTURE
OF OUR INDUSTRY
IN OUR HANDS**



THE FUTURE
OF OUR INDUSTRY
IN OUR HANDS



MID TERM
REVIEW
2016



**THE BIG FIVE
QUESTIONS**
ARE YOU 2020 READY?

THE TALKER



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[Industry events](#) ▾

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[Big 5 Questions](#) ▾

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Help Shape Scottish Tourism

TOURISM SCOTLAND 2020

FIND OUT MORE



TOURISM IS EVERYONE'S BUSINESS



Scottish Tourism Alliance Patrons

Arnold Clark
CAR & VAN RENTAL

Bidvest
Foodservice

ScotRail
SCOTLAND'S RAILWAY

johnston fuels
ENERGY DELIVERED BY PEOPLE

DAM
Making Pensions Personal

MACDONALD
HOTELS & RESORTS

Microsoft

Fishers

bs
bruce stevenson
Insurance Brokers

clock

french duncan.
chartered accountants

vision events

TENNENT'S
— TRAINING ACADEMY —

RBS
The Royal Bank of Scotland

LOGANAIR
SCOTLAND'S AIRLINE

Caledonian MacBrayne
Hebridean & Clyde Ferries

BRIDGING THE GAP

Linking with others & representing common issues together.



TourismAlliance
the voice of tourism



Building relations and working with industry colleagues from outside Scotland

TIAC  **AITC**



itjc
IRISH TOURIST
INDUSTRY CONFEDERATION

Why Tourism Matters

 5% GDP	 1/3 JOBS	 €7.3 bn VALUE OF IRISH TOURISM INDUSTRY	 16% INCREASE IN 2015	 €1.8 bn PAID TO EXCISES IN TAXES ANNUALLY
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Connecting & Celebrating with Friends

BRIDGING THE GAP

A STRATEGY FOR LEADERSHIP AND GROWTH

THE **FUTURE**
OF OUR INDUSTRY
IN OUR **HANDS**



Our Collective Vision to 2020

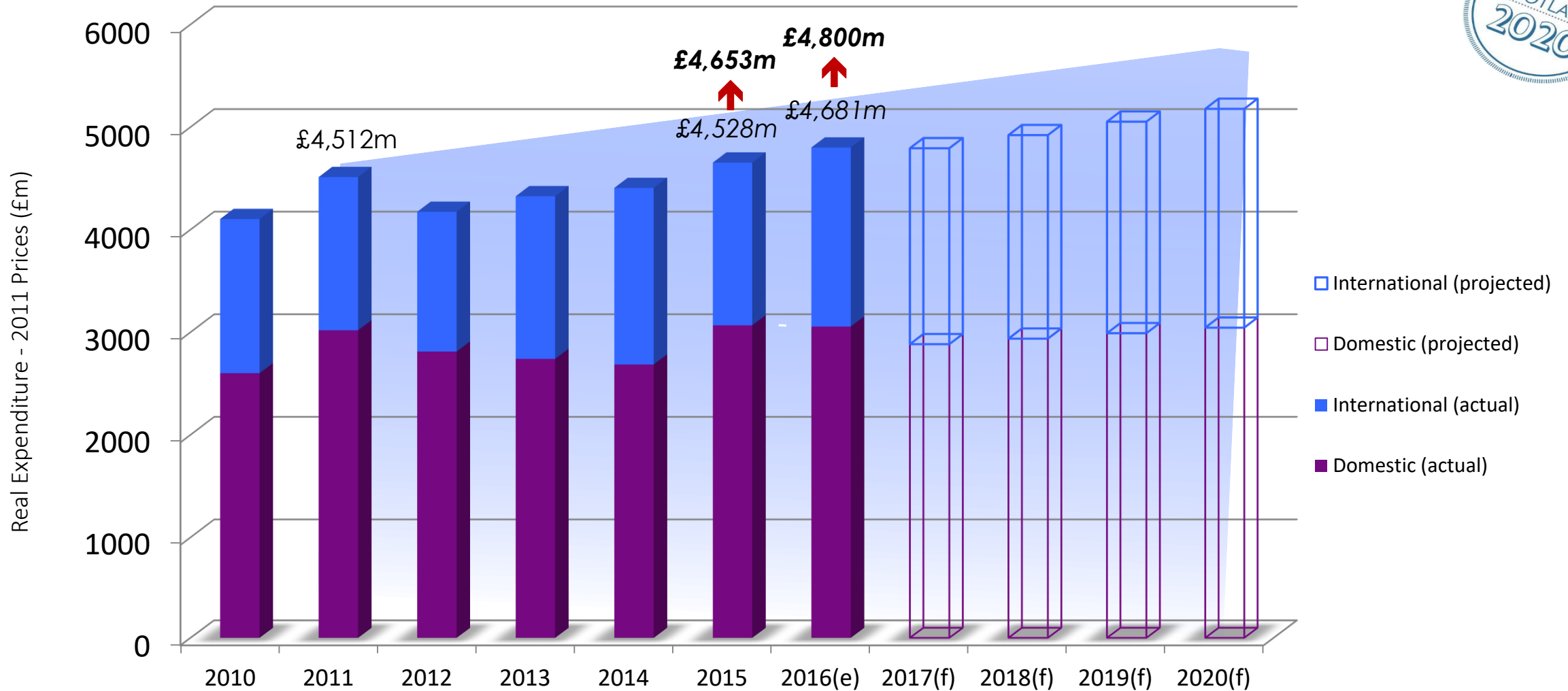
*To make Scotland a destination of first choice for a **high quality, value for money and memorable customer experience, delivered by skilled and passionate people.***



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Looking Ahead to 2020 – Here's how are we doing

Actual & Projected Visitor Expenditure: 2010 - 2020



2017



Brexit and terrorism are creating tourism boost for Scotland

'Resilient'
Scottish economy buoyed by tourism during summer of Brexit



Weak pound helps **'boost'** Scottish tourist industry

Historic attractions break a legion of visitor records

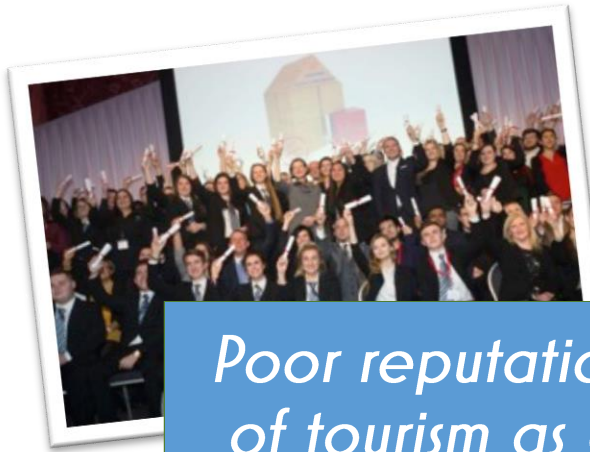


BRIDGING THE GAP

IT'S A FAST CHANGING WORLD WE LIVE IN
NOT WITHOUT CHALLENGE



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Poor reputation of tourism as a career



Economic uncertainty



Specific skills gaps, e.g. chefs



With Many Challenges to Overcome

Rising costs of doing business

Brexit & affect on availability of labour

Job retention

Staying Ahead Of Our Competitors

*It's a more competitive world
moving at an increasingly faster
and faster pace!*



135/136

More people now own a mobile phone
than a toothbrush



Lots of Innovation and Product Development



Lechal



Changing Traveller Trends



The Evolving Traveller

Growing middle-class with aspiration & disposable income to travel
By 2030, more than 5m Asian travellers visiting UK.



Living / Dining

By 2020, spend on food by inbound tourists to UK = £6bn.
Immersive, appealing, delicious, shared & interactive.



Experience More

Valuing the pleasure of genuine experiences above owning things.
42% of millennials prefer experiences to owning things.



Smart Destinations

Online & mobile travel sales to UK residents estimated to be £34bn and £11bn respectively by 2020.



Authentic Affordable Luxury

Shift from conspicuous consumption to conscientious consumption
Travel expenditure likely to rise by 2030, but average spend/trip likely to decline.

Changing Habits and Expectations

From The Must See To The Must Experience

*“The focus of many tourists has changed from the classic ‘must see’ physical sights, such as museums and monuments, towards a ‘**must experience**’ imperative to consume **intangible** expressions of culture, such as atmosphere, creativity and lifestyle.*

Food is one of the essential expressions of any culture and one of the elements of creativity in everyday life that is engaging for many tourists. This provides **new opportunities** for tourism destinations and at the same time creates new challenges, particularly in the areas of experience development, marketing and branding”



Food & Drink Tourism is already Trending

- Search for authentic & local food is paramount – getting closer to the source
- Not about Michelin-starred restaurants – foundation is local
- Rise of Craft Beer & Gin tourism
- Food integrated into other cultural events – music festivals etc
- Casual food tourism – street food
- Millennials – driving food tourism trends – skimp on accommodation but not food – drivers of sharing economy (Eat Like a Local, Vizeat)
- Pop-ups, chef collaborations, exclusivity
- Importance of digital – rise of food tourism video; food tourists are social media masters



BRIDGING THE GAP

THE POLITICAL LANDSCAPE HAS CHANGED AND IS
NOT WITHOUT ITS CHALLENGES TOO!



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SCOTTISH

WHOLESALE

ASSOCIATION

BREXIT





HE'S STILL
HANGING
ABOUT



HE'S MAYBE
BACK IN
THE GAME



HE'S GONE



INDYREEF2

BRIDGING THE GAP

HOW WE ARE SHAPING UP FOR 2030



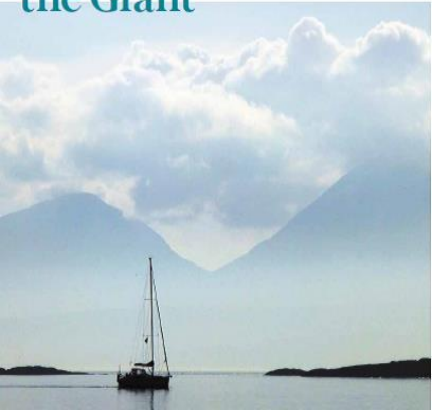
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2014



Working Together

Awakening the Giant



Skills Investment Plan for Scotland's Tourism Sector



OUR PLACE IN TIME
THE HISTORIC ENVIRONMENT
STRATEGY FOR SCOTLAND

GOING FURTHER
The National Strategy for
Scotland's Museums and Galleries



People Make Heritage
Heritage Tourism 2020

Tourism Falkirk 2020
Falkirk Area Tourism Strategy 2015 - 2020

THINK
SCOTLAND
THINK
CONFERENCE

SCOTLAND THE PERFECT STAGE
SCOTLAND'S EVENTS STRATEGY 2015-2025

TO 2020

- To increase the proportion of the population in high quality jobs for money and worth (based on productivity) to 40% from 35% (based on 2010 levels)
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Family day-out	Other people days out	Leisure breaks for couples & families
Advisory visitors	Group travel	Business tourism
Home LIFE	NEW MARKETS	EMERGING MARKETS
High level, high value	Mass (10-150k) + niche	Low cost, low value
Lack of industry support	Lack of industry support	Lack of industry support
Lack of industry support	Lack of industry support	Lack of industry support
Lack of industry support	Lack of industry support	Lack of industry support
Lack of industry support	Lack of industry support	Lack of industry support
Lack of industry support	Lack of industry support	Lack of industry support

STRATEGIC CONTENT & OPPORTUNITIES

Policy context	Business case	Brand & identity	Product range	Operational
• EU Strategy 2020	• Growth & innovation	• Brand & identity	• Product range	• Operational
• EU Strategy 2020	• Growth & innovation	• Brand & identity	• Product range	• Operational
• EU Strategy 2020	• Growth & innovation	• Brand & identity	• Product range	• Operational
• EU Strategy 2020	• Growth & innovation	• Brand & identity	• Product range	• Operational
• EU Strategy 2020	• Growth & innovation	• Brand & identity	• Product range	• Operational

ACHIEVING THE ECONOMIC PLAN - PUTTING THE ECONOMIC PLAN TO WORK

Food & drink	Transport	Accommodation	Digital	Visitor
• Food & drink	• Transport	• Accommodation	• Digital	• Visitor
• Food & drink	• Transport	• Accommodation	• Digital	• Visitor
• Food & drink	• Transport	• Accommodation	• Digital	• Visitor
• Food & drink	• Transport	• Accommodation	• Digital	• Visitor
• Food & drink	• Transport	• Accommodation	• Digital	• Visitor

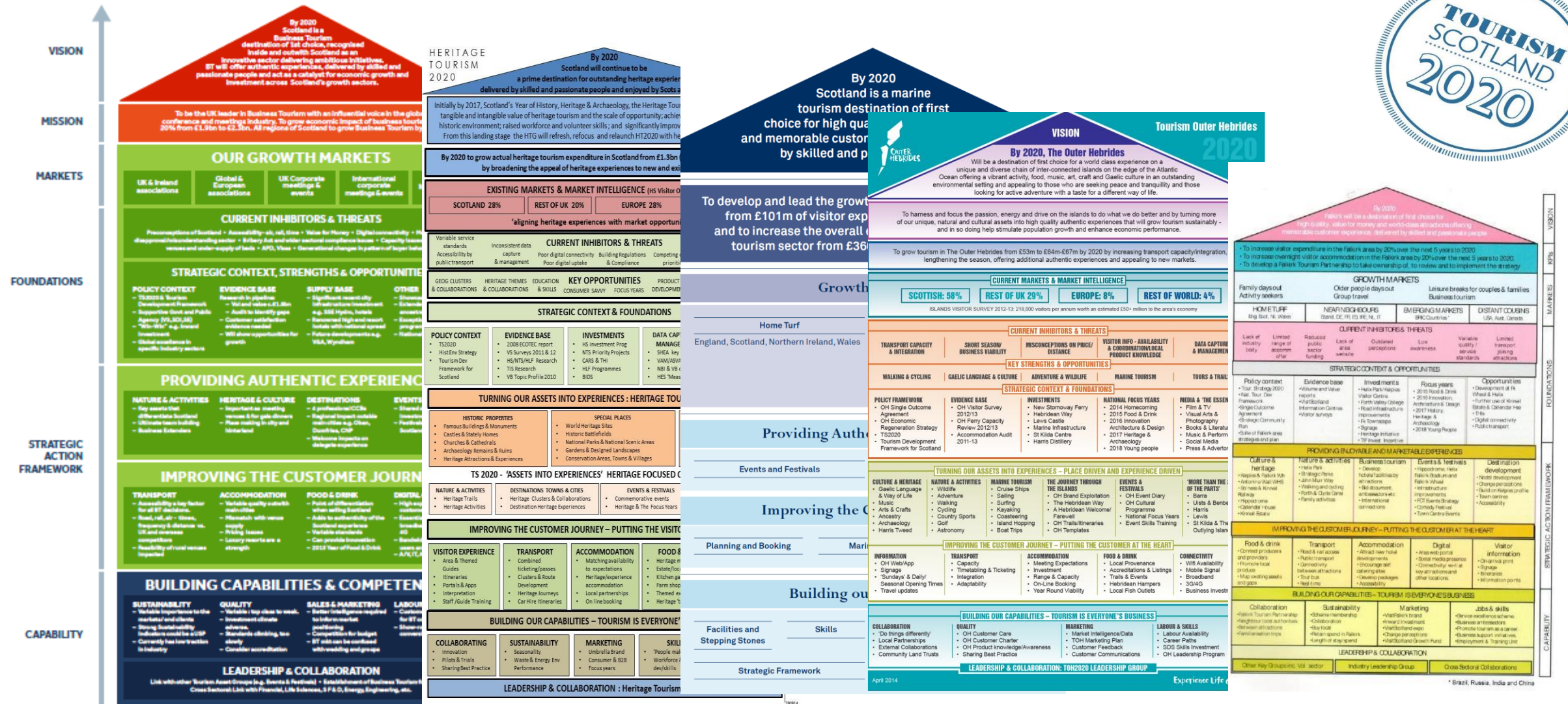
REACHING OUR ECONOMIC PLAN - TOURISM GOVERNANCE & DELIVERY

Collaboration	Sustainability	Marketing	Jobs & skills
• Collaboration	• Sustainability	• Marketing	• Jobs & skills
• Collaboration	• Sustainability	• Marketing	• Jobs & skills
• Collaboration	• Sustainability	• Marketing	• Jobs & skills
• Collaboration	• Sustainability	• Marketing	• Jobs & skills
• Collaboration	• Sustainability	• Marketing	• Jobs & skills

Other Key Stakeholders: Public sector, Industry Leadership Groups, Cross Sectoral Collaborations

* Seoul, Russia, India and China

Creating a Common Framework



VISION
MISSION
MARKETS
FOUNDATIONS
STRATEGIC ACTION FRAMEWORK
CAPABILITY

VISION
MISSION
MARKETS
FOUNDATIONS
STRATEGIC ACTION FRAMEWORK
CAPABILITY

HERITAGE TOURISM 2020

By 2020 Scotland will continue to be a prime destination for outstanding heritage experience delivered by skilled and passionate people and enjoyed by Scots

Initially by 2017, Scotland's Year of History, Heritage & Archaeology, the Heritage Tour will offer authentic experiences, delivered by skilled and passionate people and act as a catalyst for economic growth and investment across Scotland's growth sectors.

By 2020 to grow actual heritage tourism expenditure in Scotland from £1.3bn by broadening the appeal of heritage experiences to new and existing markets

EXISTING MARKETS & MARKET INTELLIGENCE (HS Visitor 2012)

SCOTLAND 28%	REST OF UK 20%	EUROPE 28%
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'aligning heritage experiences with market opportunities'

CURRENT INHIBITORS & THREATS

Variable service standards	Inconsistent data capture	Poor digital connectivity	Building Regulations	Competing priorities
Accessibility by public transport	Management	Poor digital update	& Compliance	

KEY OPPORTUNITIES

GEOG CLUSTERS & COLLABORATIONS	HERITAGE THEMES & COLLABORATIONS	EDUCATION & SKILLS	CONSUMER SAVVY	FOCUS YEARS	PRODUCT DEVELOPMENT
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STRATEGIC CONTEXT & FOUNDATIONS

POLICY CONTEXT	EVIDENCE BASE	INVESTMENTS	DATA CAP. MANAGE
TS2020 & Tourism Dev Framework for Scotland	2008 ECOTEC report VS Surveys 2011 & 12 HS/NTS/HLF Research TS Research V8 Topic Profile 2010	HS Investment Prog NTS Priority Projects CARs & TH HLF Programmes BIDS	SHEA Key VAM/ASVA NBI & VS HES' Needs

TURNING OUR ASSETS INTO EXPERIENCES: HERITAGE TOURISM

HISTORIC PROPERTIES	SPECIAL PLACES
Famous Buildings & Monuments Castles & Stately Homes Churches & Cathedrals Archaeology Remains & Ruins Heritage Attractions & Experiences	World Heritage Sites Historic Battlefields National Parks & National Scenic Areas Gardens & Designed Landscapes Conservation Areas, Towns & Villages

TS 2020 - 'ASSETS INTO EXPERIENCES' HERITAGE FOCUSED ON

NATURE & ACTIVITIES	DESTINATIONS TOWNS & CITIES	EVENTS & FESTIVALS
Heritage Trails Heritage Activities	Heritage Clusters & Collaborations Destination Heritage Experiences	Commemorative events Heritage & the Focus Years

IMPROVING THE CUSTOMER JOURNEY - PUTTING THE VISITOR AT THE HEART

VISITOR EXPERIENCE	TRANSPORT	ACCOMMODATION	FOOD & DRINK
Area & Themed Guides Itineraries Portals & Apps Interpretation Staff/Guide Training	Combined ticketing/passages Clusters & Route Development Heritage Journeys Car Hire Itineraries	Matching availability to expectations Heritage/experience accommodation Local partnerships On line booking	Heritage experiences Estates/food Kitchen/ga Farm shops Heritage

BUILDING OUR CAPABILITIES - TOURISM IS EVERYONE'S BUSINESS

COLLABORATION	SUSTAINABILITY	MARKETING	SKILLS
Innovation Pilot's trials Sharing Best Practice	Seasonality Waste & Energy Env Performance	Umbrella Brand Consumer & B2B Focus years	People mab Workforce dev/Skills

LEADERSHIP & COLLABORATION: Heritage Tourism

Scotland is a marine tourism destination of first choice for high quality and memorable customer experiences delivered by skilled and passionate people

By 2020, The Outer Hebrides will be a destination of first choice for a world class experience on a unique and diverse chain of inter-connected islands on the edge of the Atlantic Ocean offering a vibrant activity, food, music, art, craft and Gaelic culture in an outstanding environmental setting and appealing to those who are seeking peace and tranquility and those looking for active adventure with a taste for a different way of life.

To harness and focus the passion, energy and drive on the islands to do what we do better and by turning more of our unique, natural and cultural assets into high quality authentic experiences that will grow tourism sustainably - and in so doing help stimulate population growth and enhance economic performance.

To grow tourism in The Outer Hebrides from £53m to £64m-£67m by 2020 by increasing transport capacity/integration, lengthening the season, offering additional authentic experiences and appealing to new markets.

CURRENT MARKETS & MARKET INTELLIGENCE

SCOTTISH: 58%	REST OF UK 29%	EUROPE: 8%	REST OF WORLD: 4%
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ISLANDS VISITOR SURVEY 2012-13: 218,000 visitors per annum worth an estimated £50m to the area's economy

CURRENT INHIBITORS & THREATS

TRANSPORT CAPACITY & INTEGRATION	SHORT SEASON/ BUSINESS VIABILITY	MISCONCEPTIONS ON PRICE/DISTANCE	VISITOR INFO - AVAILABILITY & COORDINATION/LOCAL PRODUCT KNOWLEDGE	DATA CAPTURE & MANAGEMENT
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KEY STRENGTHS & OPPORTUNITIES

WALKING & CYCLING	GAELIC LANGUAGE & CULTURE	ADVENTURE & WILDLIFE	MARINE TOURISM	TOURS & TRAIL
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STRATEGIC CONTEXT & FOUNDATIONS

POLICY FRAMEWORK	EVIDENCE BASE	INVESTMENTS	NATIONAL FOCUS YEARS	INDIA & THE ESSEN
OH Single Outcome Agreement OH Economic Regeneration Strategy TS2020 Tourism Development Framework for Scotland	OH Visitor Survey 2012/13 OH Ferry Capacity Review 2012/13 Accommodation Audit 2011-13	New Stornoway Ferry Hebridean Way Levis Castle Marine Infrastructure St Kilda Centre Harris Distillery	2014 Homecoming 2015 Food & Drink 2016 Innovation Architecture & Design 2017 Heritage & Archaeology 2018 Young people	Film & TV Visual Arts & Photography Books & Literature Music & Perform Social Media Press & Advisor

TURNING OUR ASSETS INTO EXPERIENCES - PLACE DRIVEN AND EXPERIENCE DRIVEN

CULTURE & HERITAGE	NATURE & ACTIVITIES	MARINE TOURISM	THE JOURNEY THROUGH THE ISLANDS	EVENTS & FESTIVALS	'MORE THAN THE PARTS OF THE WHOLE'
Gaelic Language & Way of Life Music Arts & Crafts Ancient Archaeology Harris Tweed	Wildlife Cycling Walking Sports Golf Astronomy	Cruise Ships Sailing Quitting Kayaking Coastwatching Island Hopping Boat Trips	OH Brand Exploitation The Hebridean Way A Hebridean Welcome! Farewell OH Trail/Itineraries OH Templates	OH Event Diary OH Culture Programme National Focus Years Event Skills Training	Bars Lists & Berbs Harris Levis OH Kilda & Outlying Isles

IMPROVING THE CUSTOMER JOURNEY - PUTTING THE CUSTOMER AT THE HEART

INFORMATION	TRANSPORT	ACCOMMODATION	FOOD & DRINK	CONNECTIVITY
OH Web/App 'Sundays & Daily' Seasonal Opening Times Travel updates	Capacity Timetabling & Ticketing Integration Adaptability	Meeting Expectations Investment Range & Capacity On-Line Booking Year Round Viability	Local Provenance Accreditations & Listings Trails & Events Hebridean Hampers Local Fish Outlets	Virt Availability Mobile Signal Broadband SOS Skills Investment Business Invest

BUILDING OUR CAPABILITIES - TOURISM IS EVERYONE'S BUSINESS

COLLABORATION	QUALITY	MARKETING	LABOUR & SKILLS
Local Partnerships OH Product Knowledge/Awareness Community Land Trusts	OH Customer Care OH Customer Charter OH Product Knowledge/Awareness Sharing Best Practice	Market Intelligence/Data TOH Marketing Plan Customer Feedback Customer Communications	Labour Availability Career Paths SOS Skills Investment OH Leadership Program

LEADERSHIP & COLLABORATION: TOH20 LEADERSHIP GROUP

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LEADERSHIP & COLLABORATION: TOH20 LEADERSHIP GROUP

By 2020 Falkirk will be a destination of first choice for high quality, value for money and world-class attractions offering memorable customer experiences delivered by skilled and passionate people

To increase visitor expenditure in the Falkirk area by 20% over the next 5 years to 2020

To increase overnight visitor accommodation in the Falkirk area by 20% over the next 5 years to 2020

To develop a Falkirk Tourism Partnership to take ownership of, review and to implement the strategy.

GROWTH MARKETS

Family day out Activity seekers	Older people day out	Leisure breaks for couples & families Business tourism
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HOMETUFF Big Scot, 16, White	NEARBY HOURS Stand, DE, FR, TH, M, T, F	EMERGING MARKETS BRIC Countries	DISTANT COUNTRIES USA, Aus, Canada
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CURRENT INHIBITORS & THREATS

Lack of industry body	Limited range of accommodation offer	Reduced public sector funding	Lack of area awareness	Outdated perceptions	Low awareness	Variable quality of service standards	Limited transport offering
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STRATEGIC CONTEXT & OPPORTUNITIES

Policy context	Evidence base	Investments	Focus years	Opportunities
TS2020 Tourism Dev Framework Single Outcome Agreement OH Economic Regeneration Strategy Tourism Development Framework for Scotland	OH Visitor Survey 2012/13 OH Ferry Capacity Review 2012/13 Accommodation Audit 2011-13	New Stornoway Ferry Hebridean Way Levis Castle Marine Infrastructure St Kilda Centre Harris Distillery	2014 Homecoming 2015 Food & Drink 2016 Innovation Architecture & Design 2017 Heritage & Archaeology 2018 Young people	Development at H Wheat & Hark Further use of Kew Banks, Cameron Ave 10 Digital connectivity Food tourism

PROVIDING BLOOMER AND MARKETABLE EXPERIENCES

Culture & heritage	Nature & activities	Marine Tourism	Event & Festivals	Local food development
Heritage Trails Heritage Activities	Wildlife Cycling Walking Sports Golf Astronomy	Cruise Ships Sailing Quitting Kayaking Coastwatching Island Hopping Boat Trips	OH Event Diary OH Culture Programme National Focus Years Event Skills Training	Heritage experiences Estates/food Kitchen/ga Farm shops Heritage

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LEADERSHIP & COLLABORATION

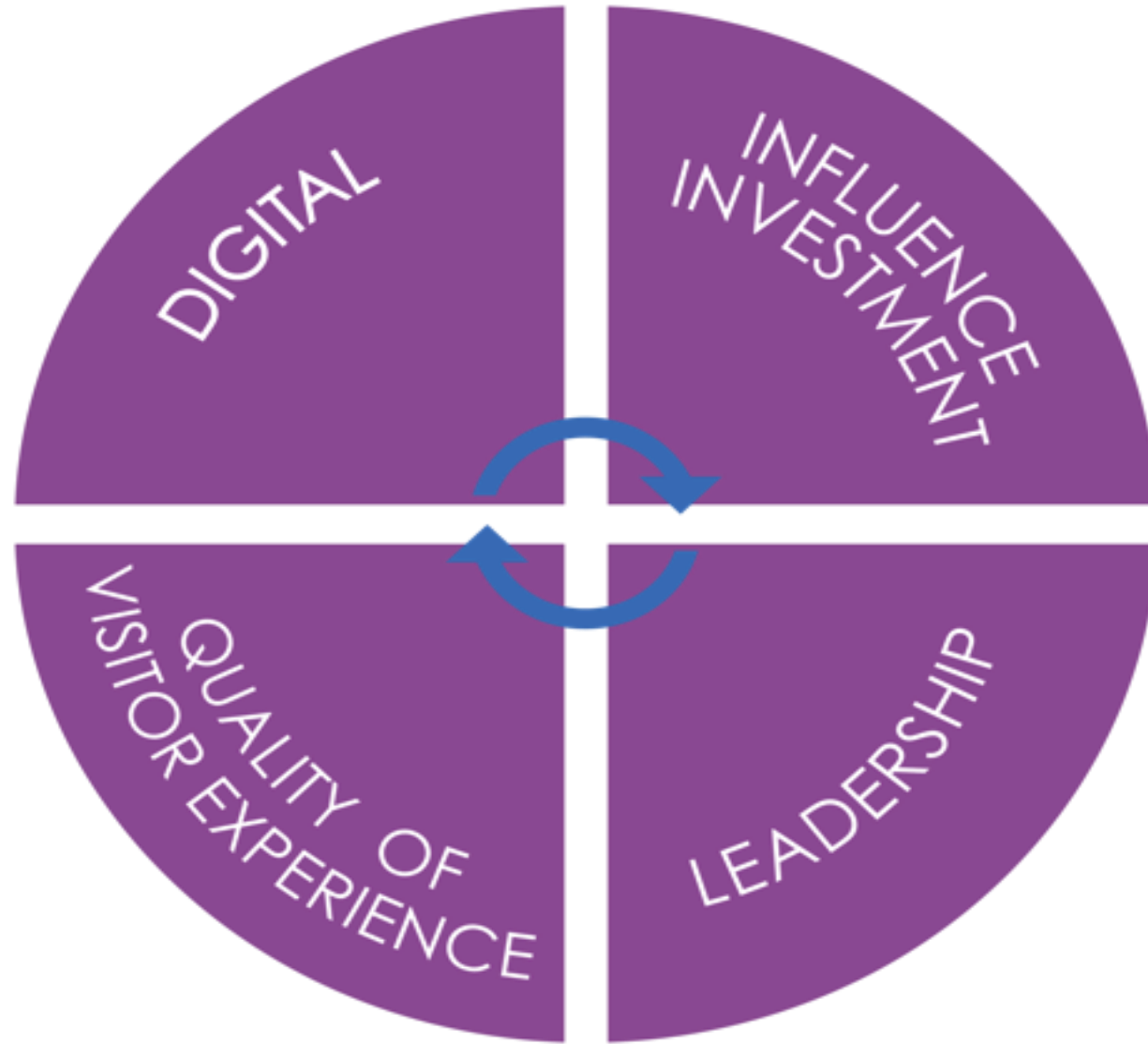
* Brazil, Russia, India and China

Creating a Common Framework

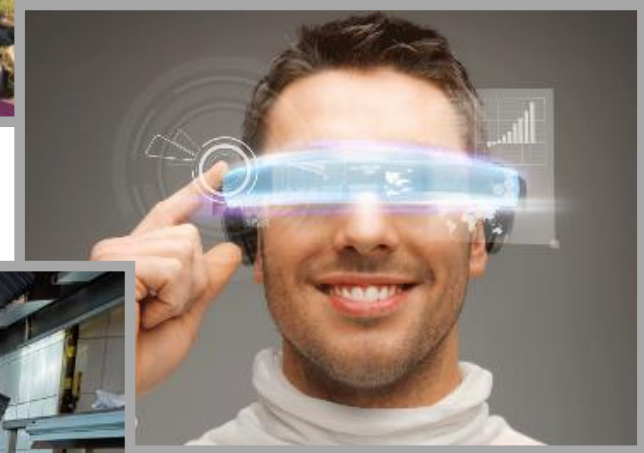
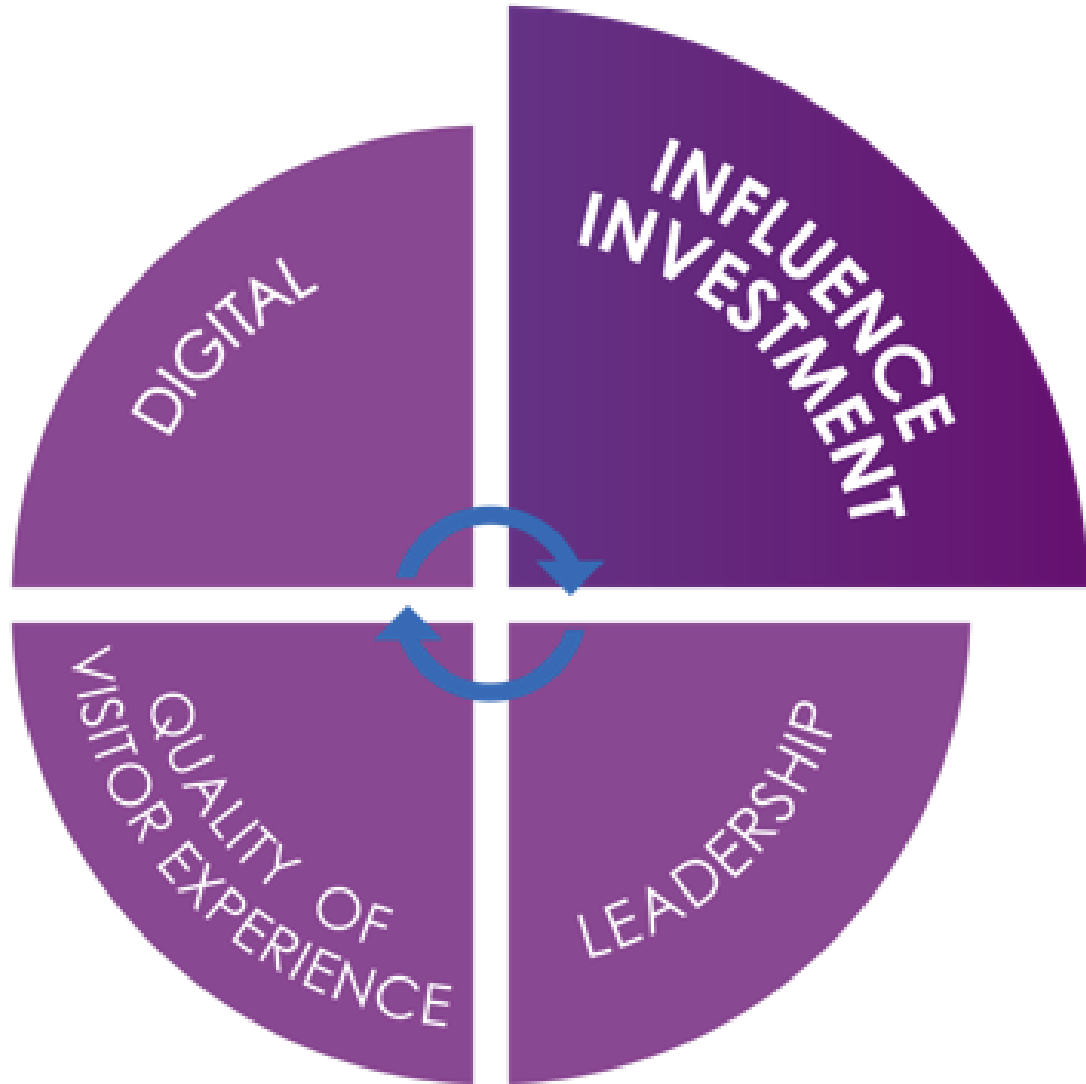
Destination Strategies: 25+



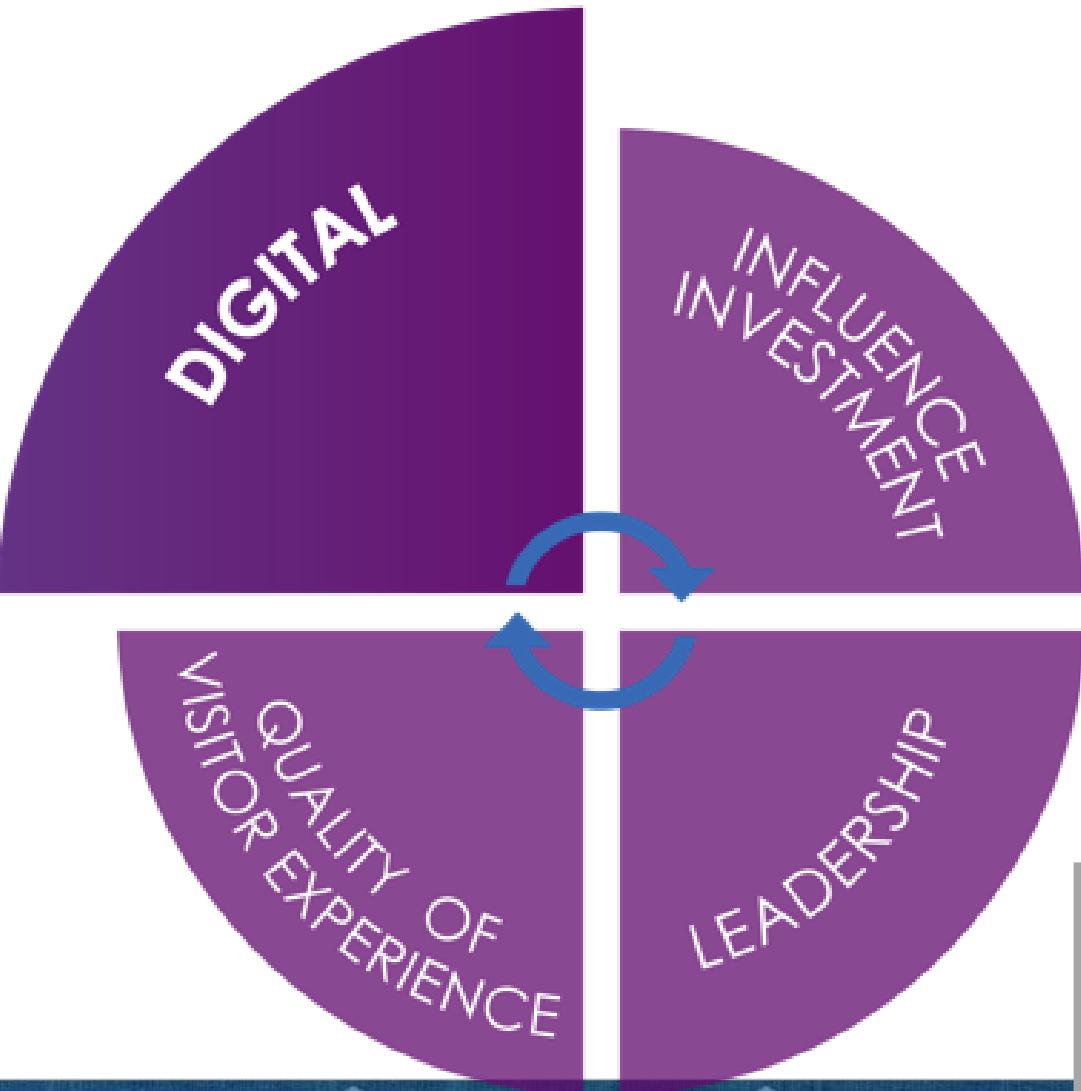
We Now Have A Sharper Focus



Telling Tourism's Story Better



More People Embracing Digital



Strengthened Our Assets



Heritage

Destinations,
Towns & Cities

Nature &
Activities

Events &
Festivals

Business
Tourism



THE YEAR OF YOUNG PEOPLE



2020 Year of Scotland's Coast & Waters

2022 Year of Scotland's Stories



The Scottish Tourism Experience



Making it Unique And Even More Memorable !"

BRIDGING THE GAP

A photograph of a white house at night with the aurora borealis in the sky. The aurora is a vibrant green and blue light display in the dark sky. The house is a two-story white building with a dark roof and a chimney. The sky is dark with many stars visible.

Join us on our journey to 2020
and beyond...

Destination 2030!

Photo by David Gifford

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BRIDGING THE GAP

A black and white photograph of Henry Ford, wearing a dark suit and a bowler hat, standing next to a vintage open-top car. The car is on the left side of the frame, and several other people in period clothing are visible in the background, slightly out of focus. The overall scene is set outdoors.

“COMING TOGETHER IS A BEGINNING; KEEPING TOGETHER IS PROGRESS; WORKING TOGETHER IS SUCCESS.”

HENRY FORD

© Lifehack Quotes

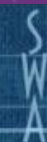


Scottish Tourism Month 2018

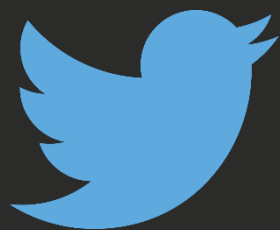
#STM2018

STA Signature Conference 1ST March @SEC

A month long programme of tourism & hospitality events for the industry, delivered by the industry.



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