

# **TOURISM @ WESTER ROSS**

## **AREA MARKETING & PROMOTIONAL STRATEGY DEVELOPED BY TOURISM AND LEISURE SOLUTIONS**

### **SUMMARY**

#### **1. Introduction**

This Strategy has been prepared on behalf of Tourism @ Wester Ross, a collaborative initiative involving Celtic Fringe; Gairloch and Loch Ewe Action Forum; Lochcarron and District Business Association; Ullapool Tourism and Business Association; Highland Council; Ross and Cromarty Enterprise; Scottish Natural Heritage and private sector partners.

A key objective of Tourism @ Wester Ross is to market the area for the benefit of local businesses and local communities.

In the course of preparing this Strategy, Tourism and Leisure Solutions have –

- Organised eight public meetings for businesses and communities to discuss issues and priorities.
- Analysed responses to questionnaires sent to local businesses requesting information, opinions and suggestions.
- Analysed over 350 questionnaire responses received from visitors to Wester Ross during Summer 2005.
- Met with public sector agencies in the area to discuss issues and priorities.
- Analysed previous research and available information relating to tourism in Wester Ross.
- Discussed initial ideas and issues with the Tourism @ Wester Ross Steering Group and refined proposals in light of their comments.

## **2. Tourism in Wester Ross**

Tourism in currently worth just over £50 million p/a to the Wester Ross economy. This represents around 8.5% of the total value of tourism in the Highlands.

There are 2.25 million tourist bedspaces available in Wester Ross each year. 64% of them are in non-serviced accommodation sectors (self catering and caravan parks). This is a much greater proportion of accommodation in non-serviced sectors than across the Highlands as a whole. Annual bedspace occupancy in Wester Ross is just under 50%. In other words, tourist beds in the area are, on average, only filled for half of the year.

Tourism in Ross & Cromarty peaks in July and August when the area achieves higher occupancy levels than the Highlands overall, but for most of the year occupancy levels in Ross & Cromarty are below Highland averages. This means that there is less seasonal spread of tourism in Ross & Cromarty than across the Highlands as a whole.

Average per capita daily tourist spend in Wester Ross is significantly lower than in the Highlands overall or, indeed, Easter Ross. This may be partly due to the preponderance of non-serviced tourist accommodation in the area, although there is some evidence that visitors perceive there to be fewer opportunities to spend money in Wester Ross.

There are no figures that outline tourism trends in Wester Ross alone, but there are no reasons to suppose that local trends are any different from trends across all of Highland region. Indeed, anecdotal evidence from local operators suggests this is the case.

Across the Highlands as a whole, there has been a substantial increase in the volume and value of UK Tourist Trips to the area since 1996. UK tourists account for almost 90% of all visits and over 80% of all tourist spend in the region. However, the average per capita spend of each UK tourist has dropped as the average length of stay has declined. This is due to the growth of short break and second holidays that has been seen across all of Scotland.

Conversely, there has been a substantial drop in the volume and value of overseas tourism in the Highlands since 1996. There has been a decline in overseas tourism across Scotland as a whole, but the drop is more pronounced in the Highlands. This is probably due to the growth of short city breaks stimulated largely by low cost airlines, which has grown overseas tourism in Edinburgh and Glasgow at the expense of rural Scotland.

### **3. Strengths and Weaknesses of Tourism in Wester Ross**

Based on feedback from both visitors and local businesses and the findings of previous research, we suggest that the following are the main strengths and weaknesses of tourism in Wester Ross.

#### **Strengths**

1. The quality of the local scenery and natural environment. (These are the main reasons why people come to the area).
2. The peaceful contrast with stressful urban life. (Peace and tranquillity are the main benefits that visitors get from visiting the area).
3. The high level of visitor loyalty and repeat visits to the area. (Many visitors have been to the area before and come back regularly).
4. The welcome and hospitality on offer. (The friendliness of the locals scores highly in what visitors like most about the area).
5. The local wildlife. (This complements the scenery and natural environment).

#### **Weaknesses**

1. The limited visitor awareness of Wester Ross as a distinct area of the Highlands in its own right. (The majority of visitors call the area The West Highlands rather than Wester Ross).
2. The costs of holidaying in the area. (For visitors, this is more a concern about value for money rather than costs per se. However local operators have grave concerns about the impact of high petrol prices).
3. Negative visitor perceptions of the weather and midges. (By far the biggest visitor gripes about the area, but it is not clear if these aspects actively deter visitors from coming).
4. The seasonality of tourism business. (Makes it unviable for many businesses to maintain year-round operations or to reinvest in upgrading facilities).

5. A lack of on-going collaborative working between local tourism businesses and organisations. (Wester Ross is an area of scattered small communities. This can cause fragmentation and duplication of effort).

From these strengths and weaknesses, we have identified the following main opportunities and threats for tourism in Wester Ross.

### **Opportunities**

1. Development of a strong Wester Ross brand to raise awareness of the area.
2. Potential to grow shoulder season business from UK markets.
3. Potential to provide visitors with easier access to information about local facilities to stimulate additional visitor spend.
4. Potential to stimulate more collaborative working between local businesses and organisations to present a more co-ordinated product to tourism markets.
5. Potential to work with partners to improve perceptions of ease of access to the area.

### **Threats**

1. Parochialism stifling collaboration.
2. Increasing transport costs and accommodation costs deterring more visitors.
3. Changes to the character of the area alienating loyal repeat visitors.
4. Increasing competition from other Scottish destinations.
5. Seasonality deterring investment to maintain and improve standards.

## **4. Marketing Proposals**

The main marketing recommendations of this report are as follows –

### **Target Markets**

A marketing strategy for Wester Ross should focus on generating additional shoulder season short break business from mainstream or generalist UK markets rather than specialist niche markets such as climbers, field sports etc.

Specialist niche markets already come to the area and know about the area through their own informal interest networks. There is limited potential to grow such markets significantly through tourism marketing campaigns.

There is much greater potential to attract more middle class, middle aged couples from Central Scotland and the Inverness/North East Scotland areas for 2 – 3 night breaks in Spring and Autumn. This is a large market segment with a growing propensity to short break in Scotland outwith the main season. Such people are looking for a mix of facilities such as low level walking and other “soft” activities, attractions, good food and scenery.

### **Marketing Themes**

Marketing campaigns should focus on the scenery and natural environment of Wester Ross and the de-stressing and restful benefits of a visit to the area. However, there should be more profiling of the coastal scenery of Wester Ross in marketing materials. More visitors mentioned the coast as a highlight of Wester Ross than the mountains.

There is also a need to convey a softer, more human image of the area. While locals describe Wester Ross using harsh words such as “raw”, “wild” and “remote”, visitors tend to use softer terms such as “beautiful”, “tranquil” and “scenic”. There is a danger that use of harsher descriptors may deter visitors by making the area seem “difficult” to enjoy and of greater appeal to adventurous and hardy types rather than ordinary couples. The majority of visitors come to Wester Ross for rest and relaxation rather than strenuous challenges.

Given the positive visitor attitudes towards the friendliness of local people, we also recommend that campaigns should profile and feature exemplar tourism operators in order to humanise the marketing message about Wester Ross. This will also help to emphasise the range and quality of facilities in the area.

### **Collaboration**

Tourism @ Wester Ross should give priority to encouraging greater collaborative working between local tourism businesses. It will be key for local businesses to work together to support common, agreed tourism messages about Wester Ross. Marketing campaigns must have the support of local businesses to be successful.

This does not mean that local identities must be subsumed within a regional identity, but there is a need for the scattered communities of Wester Ross to work more

closely together to retain visitors in the area longer by referring them to other local communities and facilities and by ensuring that visitors have good information about all of the area rather than just small local parts of it.

### **Nomenclature**

The name “Wester Ross” must be given greater visibility to raise awareness of the area as a distinct entity in its own right. The visitor survey asked visitors what they call the area. Only a minority call it “Wester Ross”. The majority call it “The West Highlands” or “The Highlands”.

There is a need to promote the name “Wester Ross” in order to differentiate the area from other parts of the Highlands and to establish it as a destination in its own right, like Skye or Lochaber.

It is not particularly important to define the boundaries of Wester Ross. Visitors aren’t really interested in boundaries. However, it is essential to encourage everyone to use the same name for the area.

### **Developing A Brand**

The most effective way to promote the name “Wester Ross” and the visitor attractions of the area will be through development of a Wester Ross brand. Such a brand can also act as a vehicle to encourage and facilitate greater local collaboration and should act as an ecolabel for the area to raise awareness of the quality and importance of the natural environment.

A Wester Ross brand should be developed by Spring 2006 to support and underpin marketing activities. We recommend that the brand design or devise should have a light, informal feel to reflect the softer image of the area that we recommend.

This brand could use the “Slow Down in Wester Ross” theme to highlight the main benefits of a visit to the area, but should also seek to link into the well known and well established “Highlands” brand. This would both act as a locator for the area and also recognise the greater current public use of the term “Highlands” to name the area.

The Highlands brand could be linked to a Wester Ross brand by use of a subtheme of “The Unspoilt West Highlands” e.g. “Slow Down in Wester Ross – The Unspoilt West Highlands”.

We also recommend that the brand should be flexible to allow adaptation by individual communities or businesses e.g. “Slow Down in Applecross”, “Slow Down in the Old Village Hotel” etc. In such uses, the name “Wester Ross” should be added to the Highlands subtheme e.g. “Slow Down in Achiltibuie – Wester Ross, The Unspoilt West Highlands”.

### **Managing A Brand**

We recommend that Tourism @ Wester Ross should develop clear technical and corporate guidelines for use of the Wester Ross brand to ensure that it is presented the same way at all times. Tourism @ Wester Ross should be managers and custodians of the brand and all uses of it should be approved by the T @ WR Steering Group.

The brand should be available to individual businesses and organisations to use, although all users should be required to meet clearly defined criteria before they can use it. Such criteria should not be seen as quality assurance standards but should require users to follow good environmental practices, train staff, provide good standards of customer service etc. In essence, criteria should be a simple Code of Conduct that covers no more than 5 or 6 key points.

This will create an aspirational brand that requires businesses to proactively apply to use it and requires them to think about their own operations when they use the brand. The aim should be to have at least 50 local businesses signed up to and using the brand by the end of 2007.

There should be no cost to businesses etc. for using the brand except where they plan to produce resalable branded merchandise. We also recommend that Tourism @ Wester Ross produces limited amounts of branded merchandise in its own right to help fund marketing activities.

### **Promotional Print**

We recommend that 50,000 Wester Ross promotional leaflets should be produced for extensive local and regional distribution from Spring 2006 onwards. These leaflets should be full colour, A3 folded to third-A4 size and should incorporate: the Wester Ross brand; an area map showing key routes, attractions and tourist facilities; copy on Spring and Autumn in the area; copy on ease of travel to the area; and advertising by local non-accommodation businesses.

Half the stock of these leaflets should be available to local businesses to display and send out in response to advance enquiries. The other 50% should be professionally distributed in neighbouring areas such as Inverness and Skye. The leaflets should both encourage extended stays in the area and attract additional visitors to the area.

We also recommend that a simplified version of the leaflet be inserted in the 2007 Landmark Press bedroom folders in Northern Highlands, Inverness and Skye.

### **Website**

Over 50% of visitors to Wester Ross obtain information about the area before their visit. The internet is their most common source of information. Therefore, we recommend that a Wester Ross website with a Content Management System and Subscriber Database facilities should be developed by Spring 2006.

This website should provide introductory generic information about the whole area, including day trip touring itineraries, and should act as a portal to other, existing local websites that can provide more detailed, localised information and details of individual businesses.

The site should incorporate optimised URLs, title tags, meta tags and headings to optimise its search engine positioning under searches such as “short breaks”, “lochs”, “wildlife”, “seafood” etc.

### **Loyalty Programmes**

Given the level of repeat visits to Wester Ross, we recommend that web-based visitor loyalty programmes should be introduced to encourage additional visits and recommendations to friends and families.

Users of the Wester Ross website should be invited to subscribe to regular e-newsletters about the area that contain information on events and new facilities, as well as special offers from individual businesses. We recommend that the first of these newsletters should be issued in September 2006 and that 2 newsletters a year be issued with a view to increasing to quarterly issues by 2008.

### **Information for Staff & Locals**

Local businesses expressed concerns that staff from outwith the area often have limited local product knowledge to pass on to visitors. This concern has also been raised by visitors.

Therefore, we recommend that Tourism @ Wester Ross should develop programmes to increase staff and local resident product knowledge of what the area has to offer visitors. We recommend that these programmes should be modelled on the "Cairngorms Connections" courses and should be introduced in early 2007.

### **Advertising Campaigns**

We recommend that self financing Spring and Autumn advertising campaigns should be run in Scottish media from Autumn 2006 onwards.

These campaigns should take the form of full and half page composite spreads in newspapers with ads from individual businesses highlighting special offers etc. Such spreads will provide opportunities to promote the Wester Ross brand and will create economies of scale that will enable local businesses to advertise in national media at a lower cost than if they were to buy such ad space on their own.

Advertising support for these campaigns from local businesses could also lever match funding from external bodies for a number of the marketing activities we recommend.

### **Public Relations**

We recommend that external public relations support should be sought in 2006 to support the launch of the new brand and new marketing activities.

PR campaigns should particularly highlight local tourism operators to humanise the marketing of Wester Ross and should aim to generate editorial coverage of the area in key travel supplements and publications.

### **Profiling in Regional & National Campaigns**

We recommend that Tourism @ Wester Ross should liaise closely with VisitScotland to increase the profile of the area and the new brand in regional and national marketing publications and campaigns.

To assist this liaison, we recommend that Tourism @ Wester Ross invite staff from VisitScotland national and regional offices to visit Wester Ross on a familiarisation visit in May or June 2006. This will raise their product knowledge of the area and address any negative perceptions about accessibility. In-kind support will be needed from local operators to make this happen.

### **Local Information Provision**

We recommend that the three TICs in the area – Gairloch, Strathcarron and Ullapool – should continue to be the main focal points of local visitor information services. We suggest that Tourism @ Wester Ross should input into VisitScotland's current review of information and sales services to ensure the on-going operation and development of these TICs.

We also recommend that unmanned information displays be established in half a dozen key visitor facilities in the area to complement the TICs and that branded leaflet dispensers be supplied to businesses throughout the area to display the new Wester Ross promotional leaflet.

### **Events**

We suggest that event development should be a key priority for Tourism @ Wester Ross, as events create additional motivations to visit and can provide temporary new facilities that attract additional visitors at a much lower cost than permanent infrastructure.

We recommend that Tourism @ Wester Ross should apply for funding from the Highland 2007 Regional Events Programme to develop 4 new cultural events under

the umbrella of Highland 2007. We also recommend that efforts should be made to attract external funding from national bodies for a major annual cultural event from 2008 onwards and from local bodies for new sporting events from 2008 onwards.

We suggest that it will be key for events to generate income streams through ticket sales, participants fees etc. from day one in order to secure their on-going sustainability.

### **Links with Travel Trade Operators**

We recommend that Tourism @ Wester Ross use its presence at the 2006 VisitScotland Expo travel trade exhibition to launch the new brand nationally, to address negative perceptions about accessibility to the area and to highlight local touring itineraries.

## **5. Funding**

We estimate that the total cost of the marketing activities we have outlined above will be £131,000 over the two years of 2006 and 2007. This is broken down as follows.

Spring & Autumn Advertising Campaigns	£40,000
Event Development & Promotion	£31,000
Print Production & Distribution	£14,500
Website Development & Maintenance	£8,500
Public Relations Support	£6,000
Brand Development & Introduction	£6,000
Product Knowledge Training Courses	£5,000
Evaluation & Monitoring	£5,000
Presence at VisitScotland Expo 2006	£4,000
Development & Maintenance of Visitor Info Facilities	£4,000
Hosting VisitScotland Familiarisation Trip	£4,000
Initial Production of Resalable Merchandise	£2,000
Developing Loyalty Programmes	£1,000
<b>TOTAL</b>	<b>£131,000</b>

We would stress that each element of the proposed marketing programme could be undertaken in its own right and that individual elements could be dropped if funding is not available.

We believe that external funding will be available for many of the elements of this programme, but we would stress that such funding will generally be one-off for new activities and will be dependent upon Tourism @ Wester Ross securing varying levels of match funding from the private sector.

We suggest that 51% of the above costs could potentially be met through external funding programmes such as the Highland 2007 Regional Events Programme, the VisitScotland Challenge Fund and European and regional funding programmes.

This will leave a balance of £64,000 to be met by other sources. We suggest that £58,000 of this could be raised through private sector advertising and in-kind support, with the remaining £6,000 being raised by visitors' entry fees to events and the sale of branded Wester Ross merchandise.

We would highlight that significantly lower levels of funding will be needed to maintain activities beyond 2007, but recognise that it is likely that the majority of on-going funding will need to come from local businesses rather than external agencies.

## **6. Delivering The Programme**

We recognise that the programme that we have recommended will require a great deal of time and effort to deliver, particularly in its early stages when funding applications to external bodies must be submitted by deadlines in early 2006.

For this reason, we suggest that Tourism @ Wester Ross will need a dedicated Project Manager in post on at least a part-time basis for the first 4 – 6 months of 2006. We suggest that Tourism @ Wester Ross should seek to recruit such a person on a fully funded secondment basis from a partner organisation or agency.