

Ambitious for Scotland



HIE Tourism Overview

Feb 2013





What is the strategy saying?

What does it mean for Highlands & Islands?

How can HIE help the industry to deliver?



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Tourism Scotland 2020 – focus on assets

Nature, heritage and activities - wildlife, walking, sailing, to country sports, castles, adventure sports and ancestry

Destination towns and cities –diversity of things to see and do, contemporary and traditional, extending the visitor season

Events and festivals – building reputation, spreading impact

Business tourism – major events, niche opportunities



New Strategy – focus on markets

Home Turf 2.5% pa £3,368m	Near Neighbours 2.6% pa £831m	Distant Cousins 5.1% pa £574m	Long Game 5.4% pa £76m
<ul style="list-style-type: none">• England & Wales £2,103m• Scotland £1,094m• Northern Ireland £171m	<ul style="list-style-type: none">• Germany £185m• Scandinavia¹ £129m• Spain £123m• France £114m• Ireland £107m• Italy £90m• Netherlands £84m	<ul style="list-style-type: none">• USA £336m• Australia £122m• Canada £116m	<ul style="list-style-type: none">• India £45m• China £20m• Russia £7m• Brazil £4m



Our Purpose

“to generate sustainable economic growth in every part of the Highlands and Islands”

Our Vision

For the Highlands and Islands to be a highly successful and competitive region in which increasing numbers of people choose to live, work, study and invest.

Our Priorities

- Supporting businesses and social enterprises to shape and realise their growth aspirations
- Strengthening communities and fragile areas
- Developing key sectors, particularly distinctive regional opportunities
- Creating the conditions for a competitive and low-carbon region



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HIEs role in delivery

- Assets into experiences
 - signature tourism experiences
 - collaborate and scale
 - Improved visitor experience
- More vibrancy in our key tourism towns and hubs
 - Food, retail, events, culture
 - Planning, investment, infrastructure
- Higher value markets
 - Product gaps
 - Building scale to enter new markets



What would success look like?

- Jobs, turnover, international sales
- Maximum benefits for communities and fragile areas
- Strong partnership across public sector and with industry
- Regional identity – live, work, invest and visit



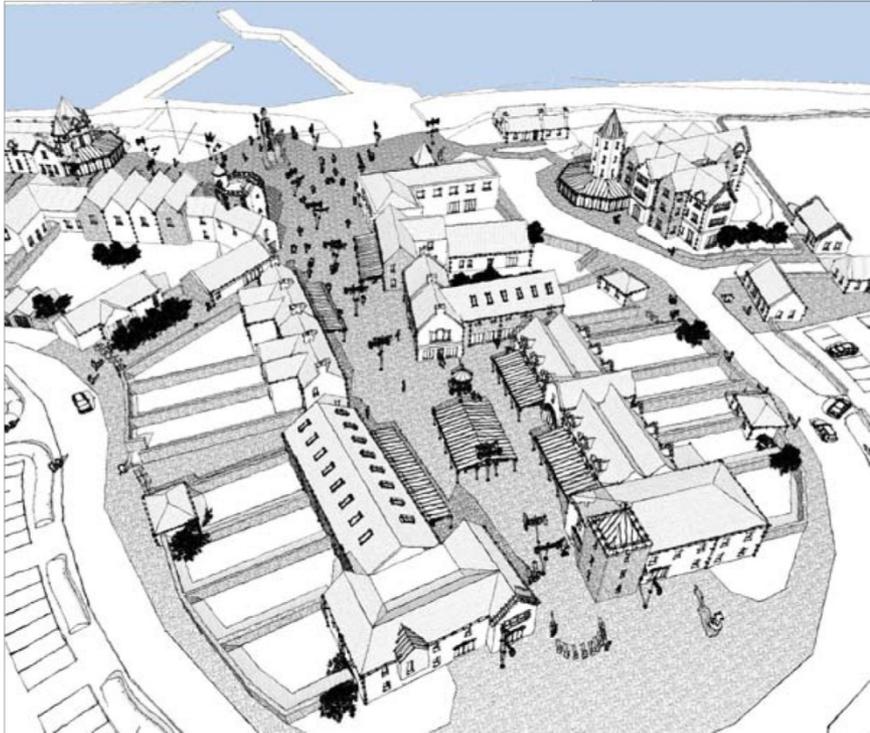
Assets into experiences



- £8m opportunity
- 100 new jobs
- Leadership, Infrastructure, international sales, Learning



Vibrancy in destinations and towns



Food, Retail, Events

Planning and investment

Collaborations & scale

Based around growth potential

Understand lifecycle



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Higher value markets

- Research product gaps / accommodation audits
- Inward propositions for key locations across the region
- Attract investment funds to support high quality accommodation
- Capability around market opportunities



Businesses & Social Enterprise Growth

- Around 100 Companies
- 40 % in Fragile Areas
- 500 companies engaged in destinations & products
- 1500 using Tourism Intelligence Scotland



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A more competitive region

- Broadband
- Air, rail & ferries
- Opportunities for young people



Market Intelligence



TIS produced...

- 10 Opportunities for Growth Guides
- 126 Case Studies,
- 15 newsletters
- 1800 in H&I

78% used intelligence in the development of their business

72% gathering and using customer feedback

56% generating new ideas.

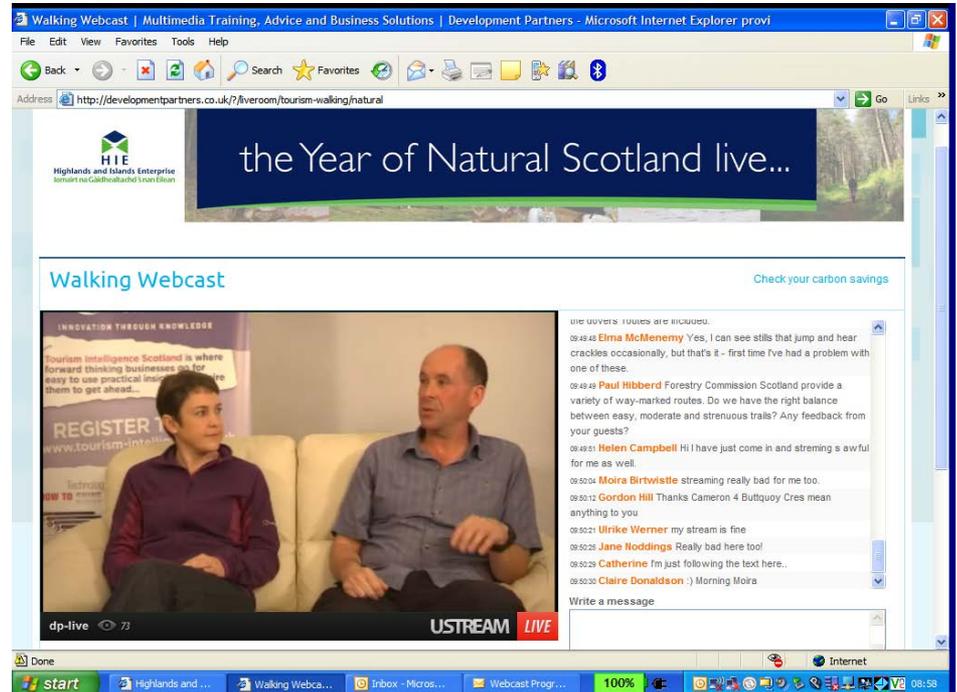


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Year of Natural Scotland Live

- 8 Growth markets
- Communities of interest
- Effective delivery



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Questions



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